Benchmarking: Finding and Implementing Best Practices

Randall Grayson, Ph.D.

Social, developmental, & organizational psychology applied to camp
www.visionrealization.com

Please utilize the audio that accompanies this presentation in order to benefit fully.
Goals of the session

- Understand what benchmarking is and is not
- Delineate benefits of benchmarking
- Describe 4 step benchmarking process
- Discuss pitfalls and stumbling blocks
- Provide further resources
Realities / Caveats

- This is not a two day seminar/training
- It is a thorough *overview* of the process, benefits, and pitfalls of benchmarking
What are your expectations?

Why are you here?
Outline

) Introduction
   i) Goals
   ii) Realities and caveats
   iii) What benchmarking is and is not
   iv) Why benchmark?
   v) Overview of benchmarking process

) Steps in the benchmarking process
   i) Planning
      (a) What to benchmark?
      (b) Picking the first candidates / processes
      (c) Picking the team and defining roles and responsibilities
      (d) How do you find the “best” practice?
      (e) Why should they tell you anything?

   ii) Collection
      (a) Screening potential benchmarking partners
      (b) Examining processes – both yours and theirs
      (c) Examining implementation and enablers
      (d) Means of collecting data
      (e) Site visits tips
      (f) Site visit / remote analysis pitfalls
      (g) Avoiding data collection pitfalls

   iii) Analyze

   iv) Adapt
      (a) Formulate and develop implementation strategy
      (b) Monitor implementation and tweak process as necessary
      (c) Communicate
Essence

- Who here thinks they are the best (or at least exceptional) at some aspect of running camp?

- Who thinks they could benefit from learning how someone else is doing some aspect of running camp better?

- Benchmarking is the practice of being humble enough to admit that someone else is better at something, and being wise enough to learn how to match or even surpass them at it.
Benchmarking is...

- A systematic and disciplined process of examining your own processes
- Finding who is better or best
- Learning how they do it
- Adapting it to your organization
- Implementing it
- Doing it continuously
Benchmarking definitions

- Process of continuous improvement without reinventing the wheel

- Process of identifying, understanding, and adapting outstanding practices from any organization to help your camp improve its performance and outcomes

- Process of continuously comparing your camp against other organizations anywhere in the world to gain information on philosophies and policies, practices, and measures which will help your camp take action to improve its performance
### Definition by way of example

<table>
<thead>
<tr>
<th>Camp Examples</th>
<th>“Out of the box” industry benchmarking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environmental education</td>
<td>Hospital admitting</td>
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<tr>
<td>Technology and scheduling</td>
<td>Gun shell case manufacturing</td>
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<tr>
<td>Alumni relations</td>
<td>Southwest airlines gate time turnaround</td>
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<td>Orientation</td>
<td>Leadership training</td>
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<td>School-camp partnerships</td>
<td></td>
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<tr>
<td>Universities or the C.C.L.</td>
<td>L.L. Bean</td>
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<tr>
<td>Coleman Day Camp</td>
<td>Maybelline Lipstick</td>
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<td>Aloha Foundation</td>
<td>Indy pit crews</td>
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<td>Trail Blazers</td>
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<td>Breakaways program</td>
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</tbody>
</table>
Benchmarking is NOT

- Only competitive analysis and benchmark cataloging
- Number crunching
- Site briefings and tourism
- Just copying or catching up
- Spying
- Quick and easy
Why benchmark?

Benchmarking accelerates innovation and change.

Continuous Improvement

Breakthrough Improvement

Continuous Improvement

TIME

PERFORMANCE
Simple idea, profound results

- More than 30 organizations (out of over 110) reported an average $76 million first-year payback

- Experienced benchmarkers averaged $198 million

- 550 points out of 1000 for Malcolm Baldrige National Quality Award
Organizations who consider it vital to their survival and growth

- AT&T
- American Cancer Society
- American Express
- Anderson Consulting
- Cisco
- Dow Chemical
- Ernst and Young
- General Motors
- Harley Davidson
- Intel
- Johnson & Johnson
- Kellogg

- Lucent
- Maytag
- Nortel
- PricewaterhouseCoopers
- Qualcomm
- Reuters
- Sandia National Laboratories
- Texaco
- 3M
- UPS
- US Postal Service
Create a learning culture

Credo

“We continually seek to improve; we haven’t cornered the market on good ideas; our existing systems, methods, and ideas are continually open to change; change is good and we welcome it; we continually look outside ourselves for fresh inspiration; we freely adapt and adopt the most useful ideas we find; we want to meet and beat the best known performance in any process.”
Further benefits

- Provides a sense of urgency
- Get a change effort off the ground
- Disciplined, systematic process of discovering what works
- Encourages striving for innovative excellence and breakthrough thinking
- Prevents reinventing the wheel
- Forces examination of own processes, which often leads to improvement in and of itself
- Create a better understanding of the industry
Process overview

- PLAN
- COLLECT
- ADAPT
- ANALYZE

20-30% 40%
10-20% 10-20%
Overview of planning stage

- What to benchmark?
- Picking the first candidates / processes
- Picking the team and defining roles and responsibilities
- How do you find the “best” practice?
- Why should they tell you anything?
What to benchmark? (1 of 4)

Use ACA’s professional development framework

- Strategic management
  - Target population and diversity
  - Leadership
  - Strategic planning
  - Mission / Purpose

- Camp community management
  - Transportation
  - Site and facilities
  - Food services
  - Health and wellness

- Operational management
  - Marketing
  - Business and finance
  - Risk management

- Program management
  - Human resources
  - Design and activities
  - Participant development and behavior
What to benchmark? (2 of 4)

- Leadership
- Strategic planning
- Customer and market focus
- Information and analysis
- Human resource development and management
- Process management
- Business results

http://www.baldrige.org/
APQC’s Process Classification Framework

Operating Processes

1. Understand Markets & Customers
2. Develop Vision & Strategy
3. Design Products & Services
4. Market & Sell
5. Produce & Deliver for Manufacturing Organization
6. Produce & Deliver for Service Organization
7. Invoice & Service Customers

Management & Support Processes

8. Develop and Manage Human Resources
9. Manage Information
10. Manage Financial and Physical Resources
11. Execute Environmental Management Program
12. Manage External Relationships
13. Manage Improvement and Change
What to benchmark? (4 of 4)

Outcomes of a camp experience

- Leadership programs
- Self-esteem
- Environmental attitudes, awareness, and behaviors
- Emotional intelligence
- Moral reasoning and values
- Creativity
- Skill areas – tennis, archery, soccer, et cetera

Examples of more concrete areas

- Staff recruiting methods
- Every component of training (behavior management, leadership, group process, staff manual, etc.)
- Other camps’ and organizations’ web sites
- How administrative development takes place
- Tripping programs
- Staff perks
- Year round operations
Picking the first candidates (1 of 2)

- What are your greatest strengths (offer to benchmarking partners) and where are your opportunities for greatest improvement?

- Where can you realistically make a change?

- What is most central to your vision and mission?
Picking the first candidates (2 of 2)

- Pick scope
  - How many processes to benchmark
  - How many benchmarking partners

- Set aside time and resources
Picking the team and defining roles & responsibilities

- Team leader
- Benchmarking expert
- Expert in process area of interest
- Data expert
- Writer / educator
- Camp expert
How do you find the “best” practice? (1 of 2)

Metrics are often not done, not kept, or not public

- Examine conference programs
  - Tri-state, National, Mid-states, New England, & Cal-West
- Tap knowledge of ACA national and sections
- National consultants
- National businesses
- *Camping Magazine*
How do you find the “best” practice? (2 of 2)

- Peer nomination
- Eells awards

- Announce search:
  - Camp Professional Discussion Group
  - *Camping Magazine*, section newsletters, & Camp Line
  - SPRENET – Society for Park and Recreation Educators
  - Adventure education listserv
  - Outdoor research listserv
Why should they tell you what they know?

- Common interest in helping children
- Altruism
- You share something they need – social exchange. Fair exchange of ideas
- “I’m soo far ahead of your, you’re toast!”
- Not competing for the same market
- Pride

- Ethical concerns aside
  - Code of conduct
  - People usually don’t give away recipe for Coke – not giving away the family jewels
Overview of collection stage

- Screening potential benchmarking partners
- Examining processes – both yours and theirs
- Examining implementation and enablers
- Means of collecting data
- Site visits tips
- Avoiding data collection pitfalls
Screening potential benchmarking partners

- Educate potential partners about benchmarking process

- Communicate
  - Why they were chosen
  - Purpose and objectives – including deliverables
  - Plans – including timeline
  - Ethical guidelines
  - Resource requirements for study time, money, staff, etc.

- Assess both their ability (roughly) and willingness
Examining processes - yours and theirs (1 of 5)

<table>
<thead>
<tr>
<th>What camp has</th>
<th>What camp does</th>
<th>What effects does camp have?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Camp</td>
<td>Program</td>
<td>Outcome</td>
</tr>
<tr>
<td></td>
<td>Activity</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Policy</td>
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</tbody>
</table>
Examining processes - yours and theirs (2 of 5)

Inputs
- Orientation (training)
- Low ratio (3:1)
- Natural resources
- Facilities
- Session length
- Quality of staff
- Organizational hierarchy / structure
- Staff motivation
- Microcosm community
- Safe, supportive environment
- Experiential learning
- Exceptional leadership on every level
- Adequate finances
- Individual treatment plan

What camp has | What camp needs
---|---
Active | Policies
Camp | Program

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Examining processes - yours and theirs (3 of 5)

size = importance        color = effectiveness

(based on theory and time and resources. Also, importance is on average, not for individuals)

Camp

Archery
Tennis
Camp craft
Water skiing
Arts & crafts
Climbing wall

Specific Skills

Ropes course and group initiatives
3 night hike
Being away from home

General self-efficacy
Examining processes - yours and theirs (4 of 5)

Knowledge
- Parenting styles
- Reality therapy
- Level one strategies

Attitude
- Tie outcomes of positive behavior management strategy to camp outcomes and staff's personal goals
- Staff trained in behavior management

Orientation

Behavior
- Role playing
- Practice during mini-session
- Experiential demonstrations

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Examining processes - yours and theirs (5 of 5)

Customer

Call is placed

Secretary

Previous customer?

Yes

Provide assistance

No

Able to help?

Yes

End of call

No

Refer to person who can

Director

Describe/sell camp

Interested?

Yes

Send video and brochure

No

Refer to other camp, send note and travel schedule, survey w/$2 as to why not chosen

5 days have passed?

Yes

Follow-up call

No

Wait

Signed up?

Yes

Send confirmation, greeting, & bill

No

Need more time?

Yes

Wait

No
Outline

I) Introduction
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II) Steps in the benchmarking process
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      f) Site visit / remote analysis pitfalls
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   iii) Analyze
   iv) Adapt
      a) Formulate and develop implementation strategy
      b) Monitor implementation and tweak process as necessary
      c) Communicate
Examining implementation & enablers

- Examine the process components as they actually happen live at camp and assess to what degree they are functioning as intended.

- Enablers = necessary or helpful preconditions
  - Professional video and brochure
  - $7,000 a summer staff perk budget & above average salaries
  - Size or nature of physical property
  - Long-standing cultural traditions or norms
  - Serve at-risk youth and you serve “normal” children
  - 14 days of staff training
  - Decentralized, choice, non-competitive program
Means of collecting data

- Hard records
  financials, demographics, paper records and descriptions, brochures, etc.

- Surveys

- Telephone interviews

- Site visit
More on site visits (1 of 3)

Before

- Coordinate the site visit agenda in detail with host company
- Identify areas of interest / processes about which you need to learn more
- Decide on your objectives and what specific things you want to learn during the visit (and what actions you might take as a result of the new information)
- Hold a preparation meeting with team
- Draft questions to have ready, but plan to be flexible. Send discussion guide to benchmarking partners. Bring typed answers (and process models) to all the questions to give to benchmarking partners
- Prepare binders for each team member
- Coordinate with team members to establish who will lead the questioning in each area, and who will document and follow through on commitments
More on site visits (2 of 3)

During

- Follow the lead of your host concerning agenda and activity order
- Ask only those questions that you would be willing to answer about your own organization
- Be prepared to offer equivalent information in return for information you receive. Social exchange. This might be on a different process.
- Aim for accurate information; exercise care to not pursue minute detail. Think like a student... why, why, why, why, why...seek enablers
- Take notes
- Take pictures and video if benchmarking partners are amenable
- Summarize key points
- Document thoughts for later action
- Ascertain where your host company is in quality evolution, so you may calibrate your comparisons
More on site visits (3 of 3)

After

- Write a letter of appreciation to your host
- Send a copy of the trip report to the company you visited
- Follow-through on all commitments made to your host
- Conduct a debriefing session and develop an action plan as soon as possible after the visit. If visit is more than one day, debrief at end of each day to ensure you are gathering information you want and allow time to revisit if necessary.
- Document findings
- Compare current operations with findings
- Identify opportunities for improvement
- Develop recommendations and implications
Careful data collection will avoid

- Reasons for gap not identified
- Interrelationships not understood
- Value of practices not determined
Site visit / remote analysis pitfalls

- Bench-browsing
- Bench-touring
- Bench-copying
- Bench-slap
Bench-browsing

Meandering through any company that will cooperate and looking for “neat” ideas.
Bench-touring

Posing as a tourist and taking PR tours of competitors in hopes of discovering “what makes them so good.”
Bench-copying

Learning about a “Best Practice” from an in-flight magazine and trying to “do exactly what they do.”
Bench-slap

Hearing about a performance measure and demanding that your staff “work harder until they get as good.”
Stage 3 = Analyzing the data

- Normalizing the data
  - Scale of camps
  - Age
  - Operate in a different economy, geography, or other external non-equivalent factor

- Compare across camps
  - Processes
  - Implementation of processes
  - Examine enablers present and absent
Stage 4 = Adapt to your camp

Formulate and develop implementation strategy

- Determine if and how process will fit your camp (barriers and enablers)
- How can process be tweaked so that your camp becomes the best around?
- Link changes to camp’s vision and mission
- Obtain feedback, buy-in, and support from key stakeholders – e.g., counselors, parents, board, campers, etc.
Adapt to your camp (2 of 3)

Monitor implementation and tweak process as necessary

- Are we where we expected to be?

- What can be tweaked so our processes and outcomes meet our benchmarking partners? How can we exceed them?

- (if appropriate) Did we save more money or create more wealth?

- Are there other organizations we should benchmark?

- How should the benchmarking process be updated for the next time?
Adapt to your camp (3 of 3)

- Communicate findings to benchmarking partners and, if appropriate, camping community

- Repeat whole process or at least re-examine your own processes – how can they be tweaked so that there is continuous improvement?
Stumbling blocks & Pitfalls
Benchmarking Resistors

- Over-my-dead body
- Fence sitters
- Januses
- Chameleons
- Termites
- Wanna-Bees
Stumbling blocks & pitfalls (2 of 4)

- Unmotivated to start
  - Conceit / delusions of grandeur
    “We’re so good (return rate, satisfaction, outcomes, etc.) that we can’t improve much.”
  - WIIFM (what’s in it for me) – pay me
  - DBU (doing business as usual) – inertia
    “We’re fine and benchmarking is a lot of work.”
  - BOHICA (bend over, here it comes again) – good idea #37
  - NIH (not invented here) – if it’s not our idea, it’s not a good idea
    “We’re different, and it won’t work here”

- Leadership isn’t on board and/or hasn’t communicated value to rest of organization. Has not been tied to organizational goals.
Stumbling blocks & pitfalls (3 of 4)

- Not part of larger strategic plan
- Benchmarking is not part of the budget
- No responsibility or accountability
- No milestones or time tables
- Picked too many processes – project becomes unwieldy and time intensive
- For first few endeavors, benchmark a process/outcome that everyone is passionate about
Stumbling blocks & pitfalls (4 of 4)

- Failure to involve process owner – A change imposed is a change opposed

- Own process is not understood well enough

- Lack of time
  - Community of practice – cracker barrel in detail, with specific jobs, reports, and membership as a privilege
  - Hire a consultant to do much of the process for you

- It’s expensive
  - It’s often more expensive not to
  - Can you afford (financially and ethically) not to serve your customers in the best manner possible?
  - Sell the results of the study
In the end...

- Is it rocket science? No.

- Could you do it yourself? Yes, if you have expertise available to you
  - Read about benchmarking and you’re probably okay
  - Must have a process expert

- Ideas are everywhere, the challenge is to habitually seek and adapt them

- It all comes down to a little humility and a lot of passion
Useful web sites

- American Productivity and Quality Center
  http://www.apqc.org/

- Malcolm Baldrige National Quality Award criteria
  http://www.baldrige.org/

- American Society for Quality
  http://www.asq.org/
Books on benchmarking

Questions & Discussion
Bonus Slides

- 8 slides better conceptualizing and defining benchmarking

- 2 slides on “if we just ignore and detract benchmarking, everything will be fine”
Benchmarking - A Journey

- Not a tool, but a process
- Not an end, but a means
- Not once, but continuous
- A way of life
“Best” Practices

- Not always “best” - but:
  - “better”
  - “exemplary”
  - “good”; “promising”
  - “successfully demonstrated”

- Solutions/approaches that achieve our objectives

- What’s best in one setting is not necessarily best in another
Average is the bottom of good and the top of bad.
Benchmarking is that which makes the:

Strange familiar & the
Familiar strange.
That man set foot on the moon

That we set eyes on the earth
“Fools say, ‘Learn from your mistakes.’

I prefer to learn from the mistakes of others.”

Bismarck
R.D. Laing’s “Knots”

The range of what we think and do is limited by what we fail to notice. And because we fail to notice that we fail to notice there is little we can do to change until we notice how failing to notice shapes our thoughts and deeds.
“I don’t go where the puck is...”

I go where it’s going to be.”

Wayne Gretzky, Hockey
Singing their song on the way down

- “We tried that ten years ago.”
- “We don’t do things that way here.”
- “But, those companies aren’t like ours, we have different problems.”
- “We’ll change, but let’s do so slowly.”
Psychology of Self-Deception

The mind can protect itself against anxiety by dimming awareness. Creating blind spots: zones of blocked attention and self-deception.

Goleman, Vital Lies, p. 97