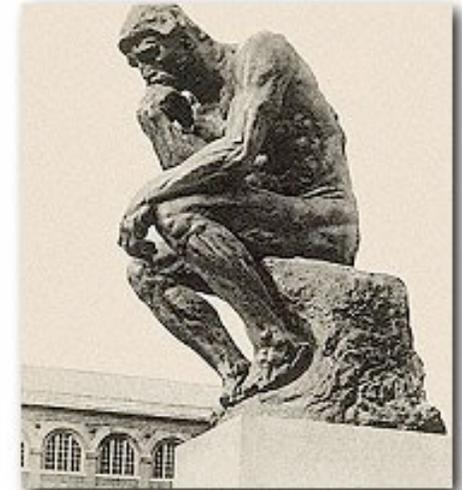# APQC Consortium Benchmarking

Methodology Overview
and
Roles and Responsibilities

What is benchmarking?

Benchmarking is the practice of being humble enough to admit that others may have better processes and wise enough to learn how to match or even surpass them.
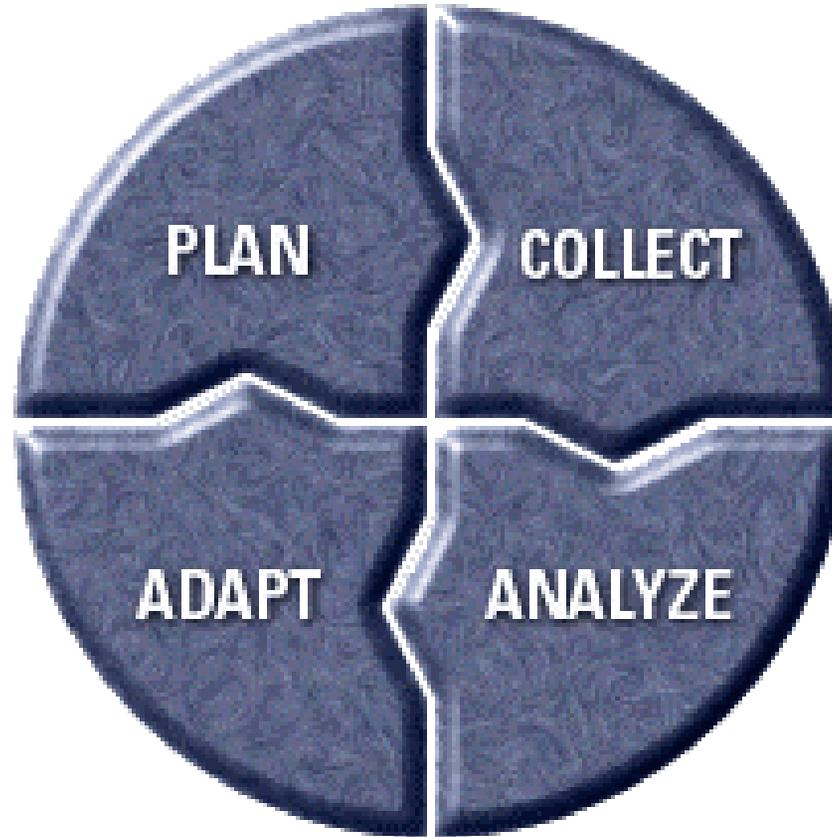

Consortium Benchmarking is benchmarking performed by a group of organizations that are interested in studying a single topic or process area.
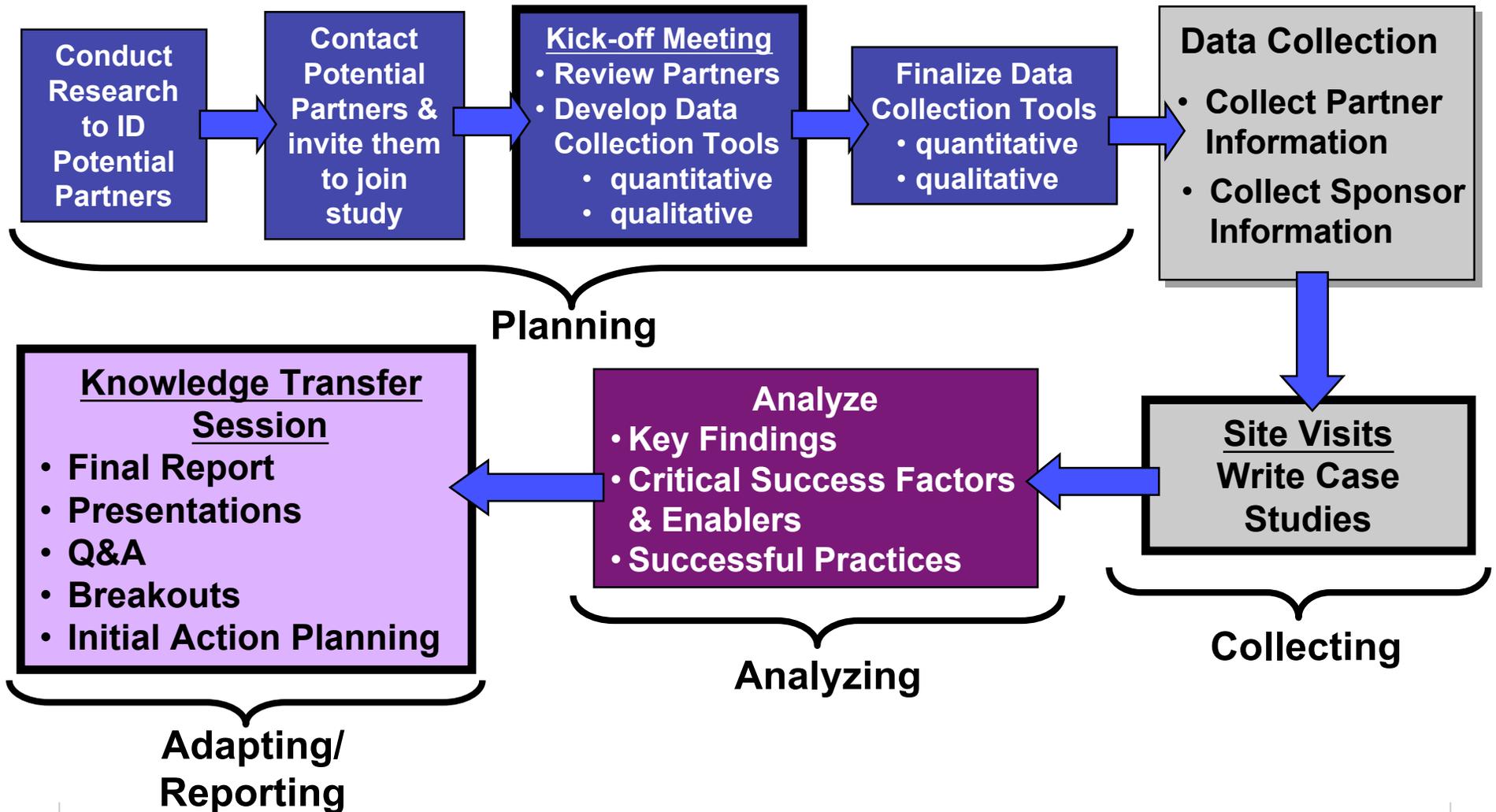
Consortium players

◆ **Project Management Team -** Individuals trained in benchmarking methodology who facilitate the study

◆ **Subject Matter Expert (SME) -** Individual with the expertise and experience in the process, functional areas, and study topic

◆ **Sponsors -** Organizations that are funding the study in order to learn from successful practice partner companies

◆ **Partners -** Organizations that are selected based upon exhibiting successful practices in the area being benchmarked

APQC's consortium benchmarking model

PLAN   COLLECT

ADAPT   ANALYZE

This is our methodology—every study is unique!

Benchmarking methodology

Conduct Research to ID Potential Partners

→

Contact Potential Partners & invite them to join study

→

Kick-off Meeting
- **Review Partners**
- **Develop Data Collection Tools**
  - **quantitative**
  - **qualitative**

→

Finalize Data Collection Tools
- **quantitative**
- **qualitative**

→

Data Collection
- **Collect Partner Information**
- **Collect Sponsor Information**

Planning

Knowledge Transfer Session
- **Final Report**
- **Presentations**
- **Q&A**
- **Breakouts**
- **Initial Action Planning**

←

Analyze
- **Key Findings**
- **Critical Success Factors & Enablers**
- **Successful Practices**

←

Site Visits
Write Case Studies

Analyzing

Collecting

Adapting/ Reporting

Selected Consortium Deliverables

- Input into the selection of best-practice partners and the questions asked on the surveys
- Participation in kickoff meeting, 5 site visits with best-practice organizations (either virtual or face-to-face), and Knowledge Transfer Session
- Networking - Significant time and on-going dialogue with subject matter experts, special advisors, and peers
- Final report with state-of-the-art information, key findings, analysis, and case studies specifically for study participants
- Detailed data on participating companies: screening survey results and profiles of best-practice candidates, blinded quantitative comparison of sponsors and best-practice partners.
- Action planning session at the KTS to begin implementation of lessons learned in the study

Consortium Fun Facts

- APQC invest an average of 1000 people hours for each consortium study we conduct. That is equivalent to _ FTE for an entire year.

- Organizations that are budget and resource constrained are finding our studies to be an effective means to get actionable strategies for improvement.

- Our studies are cost-effective because they are funded by several organizations saving both time and money.

Roles and responsibilities

◆ **Project Management Team** - Individuals trained in APQC's benchmarking methodology who facilitate the study

Phase 1	Phase 2	Phase 3	Phase 4
• Determine study scope • Identify potential partners • Conduct Kickoff	• Facilitate site visits • Collect completed DQs from sponsors and partners	• Discover critical success factors & enablers • Identify successful practices • Summarize Key Findings	• Write final report with SME • Conduct KTS • Present final report and key findings

Roles and responsibilities

◆ **Subject Matter Expert (SME) -** Individual with the expertise and experience in the process, functional areas, and study topic

Phase 1	Phase 2	Phase 3	Phase 4
• Narrow study scope • Suggest possible partners • Present state of union & scope at Kickoff Meeting	• Attend site visits • Make sure that all scope areas are covered in site visit • Ask probing follow-up questions	• Discover critical success factors & enablers • Identify successful practices • Summarize Key Findings	• Write final report with project team • Report out on key findings at the KTS

Roles and responsibilities

◆ **Sponsors - Organizations that are funding and directing the study in order to learn from successful partner organizations**

Phase 1	Phase 2	Phase 3	Phase 4
• Attend Kickoff • Review and edit data collection tools • Discuss partners	• Attend Site Visits • Complete detailed questionnaire	• Provide comparative data • Continue to share and provide input	• Attend KTS • Learn about key findings • Network with partner companies and other sponsors

Roles and responsibilities

◆ **Partners -** Organizations that are selected based upon their successful practices in the area being benchmarked

Phase 1	Phase 2	Phase 3	Phase 4
• Complete screening survey	• Host site visits • Complete detailed questionnaire	• Review site visit summaries • Continue to provide comparative data	• Present their practices at the KTS

Rules of the game

- **Participating organizations agree to abide by the principles addressed in the APQC Benchmarking Code of Conduct.**

- **Adherence to the code of conduct will contribute to efficient, effective, and ethical benchmarking.**
    - **Participants agree to share information only within their own companies, and only for the purposes of learning and improvement.**
    - **Participants agree <u>NOT</u> to use the material for commercial or competitive use.**
    - **Participants must be willing to share the same type and level of information requested from other companies.**
    - **See <u>http://www.apqc.org/bmkcode</u> for more details**

Confidentiality norms

- Project team will **blind** quantitative participant data from other participants

- To obtain maximum value in the study, participants are asked to exchange information in accordance with the benchmarking code of conduct; however, both Sponsor and Partner organizations have the right to decline to answer specific questions (in the detailed questionnaire and/or site visit) they deem too proprietary or sensitive.

For additional information

- Visit APQC's Web site on benchmarking
  - http://www.apqc.org/clg

- Call APQC at 800-776-9676 or 713-681-4020

- Email APQC at apqcinfo@apqc.org

- Visit APQC in Houston

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