

# Benchmarking

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## Personal Development

### WHAT IS IT

This Guide explains how Benchmarking can be an excellent method of developing an individual's knowledge, or for an organisation to use as a specific method for comparing itself either internally against other departments, or externally against other organisations recognised for their best practice in the specific topic.

### WHY USE IT

'Excellence' or 'best practice' is often the norm for organisations and individuals to strive for in order to improve their performance and competitive edge.

Time is a precious commodity for both the individual and organisations and Benchmarking enables both make excellent use of time when seeking to adopt best practice.

Benchmarking provides the opportunity to quickly access 'best practice' for a specific topic or issue, make comparisons with their own / organisation's current knowledge or practices, identify opportunities for improvements and develop plans to realise these improvements.

### BEST PRACTICE GUIDELINES

#### 1. WHEN TO USE

- An individual needs to improve their level of knowledge of a specific subject by understanding what best practice looks like in another part of the business or an external organisation.
- or
- An individual is working on a project (leader or team member) that needs to introduce a new or improved business practice e.g. Re-imburement, and needs to quickly obtain a detailed understanding of what best practice for this looks like in another organisation.

Both of the above situations are characterised by the need for:-

- Speed and
- Access best practice or 'excellence'.

#### 2. HOW TO USE

The application of best practice, no matter what the topic in question, will normally provide high payback to both individuals and organisations. The following guidelines will assist to maximise the value obtained from this development opportunity.

## Planning the Visit

- Agree the specific focus for improved knowledge or an improved process. This will normally arise from an individual's learning needs or results of a process improvement project
- Identify from appropriate research (colleagues, network, web, best practice associations, specialist consultants, etc) potential sources of best practice for the required topic.
- When Benchmarking with external organisations, seek to identify potential sources of best practices from outside the industry the individual is currently involved with.
- If necessary, limit the number of organisations to be visited to a small number
- Identify a suitable individual (normally the most senior specialist in the relevant topic) within each organisation, contact each by telephone and make your requests
- Most individuals or organisations will be very willing to share their best practice and open to receiving such requests from anyone other than competitors
- Agree with the host the exact nature of the benchmarking you are pursuing so they may make arrangements accordingly and confirm by e-mail
- Take care with the length of your visit. Most hosts will be happy to commit to an hour's meeting and anything more than this should only be sought with sensitivity
- Define SMART objectives for your visit together with details of how to evaluate the value actually derived from the development opportunity
- Prior to your visit prepare:-
  - a concise plan of the information you want to obtain
  - how you expect to obtain it, questions, demos, etc

## The Visit

- Effective planning and preparation for your visit, particularly the questions you want to ask should enable you to obtain all the information you require in the agreed time scale
- At the start of the meeting, re-assure or agree with the host:-
  - of the absence of any competition between the two parties
  - your intention not to solicit any confidential data or infringe any other legalities
  - your intention only to use information obtained for your own consumption
  - your intention to reciprocate by providing comparative information
  - how to best conduct the meeting, e.g. if you have got a long list of questions then you could make light of you not wanting it to seem like a TV Quiz programme, albeit you want to make good use of each others time together
- During the meeting, demonstrate effective questioning skills to obtain the required information together with noting any other relevant observations and reactions
- Consistently interpret the information received in order to:-
  - seek clarity of understanding where required
  - but accept you will only have time for an initial interpretation
  - draw comparisons with your own knowledge or situation
  - avoid any criticism of the information
  - double check you are obtaining the information you actually need
- Be prepared to share your experiences whilst accepting that time devoted to this reduces time available for your own questions
- Offer the host to contact you at any time in the future in order to reciprocate on a subject that you or your function demonstrate best practice
- Before the end of the meeting evaluate the experience against your original learning objective and decide the extent to which it has been met.

**Post-event**

- Formally thank your host
- Share your learning with others outside of your immediate team through presentations or knowledge repositories

**3. EVALUATION**

- Share your experience with your learning buddy, focusing on interpretation of the learning to improve job performance
- Evaluate the impact of the learning obtained from your visit and agree next steps with your manager in order to achieve the agreed development objective

**4. TOP TIPS**

<b>For the Individual</b>
<ul style="list-style-type: none"> <li>○ Research carefully the final selection of organisations to visit</li> <li>○ Apply this same diligence to selecting the individual you contact to explain the nature of your benchmarking request</li> <li>○ Individual hosts are normally very happy to share with a complete stranger something they do well so long as they do not feel threatened and the initial contact is business like and managed effectively</li> <li>○ Look to establish a relationship with your host from which both parties can gain.</li> </ul>
<b>For the Manager</b>
<ul style="list-style-type: none"> <li>○ Benchmark visits are often considered as a tool to support continuous improvement programmes, but they are also a very effective opportunity to develop individuals</li> <li>○ Encourage the individual to carefully consider the final selection of organisations to visit</li> <li>○ Before the visits are undertaken agree objective, evaluation method, and date for follow-up review</li> <li>○ After the visit listen carefully to the feedback and assess individual's level of confidence to apply the learning to satisfy the agreed development objective and be ready to provide additional support as required</li> <li>○ Encourage the individual to share learning with other functions in order to increase the scope and value of the payback.</li> </ul>

**NEXT STEPS**

We trust that this Success Guide will assist your personal development and help build your capability and performance

You may find some of our other Success Guides of value for your Personal or Career Development. For your convenience we list these below and you can access the index for these via the link below:-

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