

The EFQM Model

Revised 2nd edition

*Now includes additional information on Use Cases,
RADAR Guidelines and Scoring Profiles*



Grant Thornton

About EFQM

EFQM has helped 50,000 organisations perform better over 30 years. By using its world-leading methodologies and the EFQM Model and technology, backed up by best practice, organisations can focus improvement on their priorities, their Purpose, and their People.

Through our integrated and carefully designed portfolio of training and services, we work side by side with leaders to better equip their teams as they manage excellence, cultural change and transformation. Our aim is to help organisations deliver positive performance and meaningful benefits for all of their Key Stakeholders and, as a consequence, society as a whole.

By becoming a successful partner to organisations around the world, we can deliver on our own ambition – to build a better future for people, for communities and for organisations themselves.

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EFQM: What We Do

A message from our CEO



Russell Longmuir
Chief Executive Officer,
EFQM

The EFQM Model has been available for more than 30 years and is now the world's most widely used management framework. In 2019 we reviewed and transformed the EFQM Model to make it fit for purpose, ready for a new decade of transformation, technological advancement, culture change and disruption. In this edition of the EFQM Model handbook, we have had the opportunity to assess and refine the model guidance to make some minor amendments to allow the user to be clear on how stakeholders should be considered and measured.

In addition, we felt it was important to produce a clear outline of the RADAR tool, which is the hugely important second dimension to the application of the EFQM Model. We have also shared some case studies, best practice information and the scoring data from the first year of use. The work that the Core Model Team undertook 2 years ago, led by Geoff Carter, has been proven to be world-leading and universally applauded, and so has not changed.

The EFQM Model coupled with the EFQM technology platform, AssessBase (efqm.org/assessbase), is a highly effective management tool that enables leaders, employees, academics, team members, students and other stakeholders to understand how an organisation should set its Purpose and deliver on its promises. And to do this in a sustainable and ethical way. The focus of the EFQM Model has become less about assessment and recognition and more about providing you with a roadmap of questions and ideas that allows you to be curious about how your organisation could be successful in improving its performance, landing change, fulfilling the needs of society and nurturing your people.

We believe you will find this edition helpful and insightful. Still, as ever, we are keen to hear your feedback, respond to your ideas and ensure the EFQM Model evolves and develops as indeed organisations of all sizes and sectors will continue to evolve and develop.

A handwritten signature in dark blue ink, appearing to read 'R Longmuir', with a stylized, flowing script.

Russell Longmuir
Chief Executive Officer, EFQM

1 Introducing the EFQM Model

Since its inception, the EFQM Model has provided a blueprint for organisations across and beyond Europe to develop a Culture of improvement and innovation.

Now, through the application of up-to-date content, insightful data, a new language and a fresh look at megatrends and various global shifts that are reshaping the world we live in, the EFQM Model provides a modern reflection of what good looks like right now.

To co-create the new EFQM Model, we surveyed nearly 2000 change experts, facilitated 24 workshops internally, spoke face to face with leaders in over 60 diverse organisations and created a core team of experts and competitors from across industries and academia.

Through this unique collaboration, we were able to craft, prototype and perfect – combining our collective expertise and experience – to enable organisations to apply a flexible framework that's fit for purpose and which helps recode their ways of working, both in the short and long term.

Addressing the very real issues facing today's modern organisations, the EFQM Model offers data-driven analysis-based tools to give organisations and individuals meaningful insights, data and support, as well as helping them to feel part of the process, to learn, and be part of the EFQM community.

Built on design thinking, the new EFQM Model has shifted from being a simple assessment tool to one that offers a vital framework and methodology to help with the changes, transformation, and disruption that individuals and organisations face every day.

Simply put, the EFQM Model will help your organisation achieve success by measuring where you are on the path to Creating Sustainable Value for your Key Stakeholders as well as yourself, helping you understand the gaps and possible solutions available, empowering you to progress and significantly improve your organisation's performance.

1 Introducing the EFQM Model

1.1 Guiding Principles that shaped the EFQM Model



The EFQM Model not only remains relevant but continues to set the management agenda for any organisation wanting a long term, sustainable future.

The EFQM Model, a globally recognised framework that supports organisations in managing change and improving performance, has experienced a number of improvement cycles over the years to make sure that it not only remains relevant but continues to set the management agenda for any organisation wanting a long term, sustainable future.

Whilst the specific content and visual identity of the EFQM Model may have changed over time, what has not changed are the underlying principles on which it is based. Regardless of the size of the organisation or whether it is public, private or third sector, these principles are as important today as they have ever been, and this latest edition of the EFQM Model is no different in continuing to stress the importance of:

- The primacy of the customer
- The need to take a long term, stakeholder centric view
- Understanding the cause and effect linkages between why an organisation does something, how it does it and what it achieves as a consequence of its actions.



www.un.org/sustainabledevelopment/sustainable-development-goals/

Given that the birthplace of the Foundation is Europe, it is not surprising to find that this most recent update of the EFQM Model, like its predecessors, acknowledges the existence of a set of European Values, best expressed in:

- The EU Charter of Fundamental Rights
- The European Convention on Human Rights
- The European Union Directive 2000/78/EC
- The European Social Charter.

The Foundation also recognises the role that organisations can play in supporting the goals of the United Nations and these goals have also helped to shape this latest edition of the EFQM Model:

- The United Nations 17 Sustainable Development Goals are a call for action by all countries to promote social equity, sound governance and prosperity while protecting the planet.
- The United Nations Global Compact (2000). Ten principles for sustainable and socially responsible business. www.unglobalcompact.org

There is an assumption and expectation that any organisation using the EFQM Model will respect and act upon the essence of the messages contained in the above, regardless of whether it is legally obliged to do so or not.

1 Introducing the EFQM Model

1.2 Use Cases

We know the EFQM Model is used and consumed by organisations for several different aims and purposes. In this section, based on the information we have gathered from experienced practitioners, you will gain an insight into the alternative uses of the EFQM Model that have been, and continue to be implemented.



Understanding Organisational Maturity

Using the EFQM Model and RADAR, organisations review their current performance, capabilities, effectiveness of their Strategy execution and sustainable value creation. Using the EFQM Model in this mode allows any organisation to take a snapshot of, and understand, its current organisational maturity.



Undergoing External Assessment and Achieving Recognition

Organisations use the EFQM Model to prepare for and then undergo an external assessment linked to EFQM's Recognition portfolio. Using the EFQM Model, qualified EFQM Assessors review the current business of an EFQM Recognition applicant, identify their main strengths and gaps, and provide it with other relevant insights. Organisations are scored out of 1000 points according to their externally reviewed level of organisational maturity and receive a Recognition certificate that matches the maturity level achieved.



Driving Transformation Programmes

There will be many reasons for an organisation wanting to undertake a transformation programme. Still, regardless of the reasons, the EFQM Model and RADAR has a role to play in designing, implementing and managing the effectiveness of that programme. The EFQM Model and RADAR help break down the transformation programme into several defined approaches and expected results that move the organisation from the "As Is" to the desired "To Be" state, managing the transformation as a red thread across the Criteria of the EFQM Model.



Building Organisational Capability for Improvement

Baselining current performance can represent the start of the journey for any organisation to establish and then develop a continuous improvement mindset over a period of time, reinforced by regular checkpoints to monitor progress. The EFQM Model and AssessBase provide any organisation with the capability to develop the desired continuous improvement mindset.



Building a New Business

In those situations where a new business is being established, be it large or an SME, the fundamentals on which the EFQM Model is based provides the new organisation with a road map for introducing what matters most in building a Key Stakeholder-driven Strategy that Creates Sustainable Value.



Sensing and Responding to the Impact of Market Disruption

Although disruption in the market has been an ever-present fact of life for organisations to deal with in the past, today, the speed and diversity of the disruption is an ever-increasing reality. Being able to sense and respond to the potential impact of major disruptions in the market by putting in place prioritised, mitigating actions is a core competence that organisations need to possess if they are to continue to be successful. The use of the EFQM Model and RADAR, regardless of the size or maturity of organisations, has been shown to have a major role in helping them to better sense and respond to these market disruptions.



Benchmarking Performance

Thanks to its simple structure and the fact that 50,000 organisations worldwide use it, the EFQM Model offers users a common language, regardless of size or sector, that acts as a facilitator for sharing good practices and the potential to learn from peers and best in class organisations. The starting point in such a benchmarking exercise is to use the EFQM Model and RADAR to build an “As is” picture to understand where the organisation stands compared to its marketplace, and beyond, before searching for benchmarking partners.



Managing Corporate Actions

Applying the EFQM Model, RADAR, and AssessBase together, gives any organisation resources capable of supporting the management of key corporate events such as mergers or demergers, or the sale and purchase of businesses. For example, in one mode of use, these tools can provide a baseline assessment of the target business to establish its fit, or otherwise, with an existing corporate structure, assistance with due diligence on acquisitions and gap analysis for integration or disposal plans. In the second mode of use, these tools can help the organisation envision the future, expressed in the context of the Model Criteria, as a consequence of such corporate actions.



Managing Risks – Building Resilience

Using the EFQM Model enables organisations to build their resilience when managing those emerging risks that have been identified with the potential to cause a significant, negative impact on the business. Having identified which of those significant risks require priority attention, RADAR can be used to develop and monitor the mitigation plans and subsequent actions, helping to protect the business by ensuring the risk has been reduced or controlled, and resilience is further embedded.



Qualifying the Capability and “Fit” of your Suppliers

Organisations are using the EFQM Model and RADAR to complement their existing procurement and funding processes, using them to baseline, accredit and track the improvement of suppliers’ and funding recipients’ capabilities and performances.

1 Introducing the EFQM Model

1.3 The EFQM Model: Concept & Structure

The strategic nature of the EFQM Model, combined with its focus on Operational Performance and a results orientation, makes it the ideal framework for testing the coherence and alignment of an organisation's ambitions for the future, referenced against its current ways of working and its responses to challenges and pain-points.



Using it provides the opportunity to see the whole, to take the holistic perspective and appreciate that an organisation is a complex but, at the same time, an organised system. Just like the world at large, an organisation should not be seen as linear, mechanical and predictable; rather, it is far better understood as a complex adaptive system made up of interdependent humans in a dynamic living world.

Any organisation using the EFQM Model:

- Recognises that it does not operate in a vacuum. It understands that it is part of a larger, complex ecosystem in which other players, known and unknown, can help or hinder its progress and that it is in its own interest to engage with and maximise the opportunity to learn and grow from others within its ecosystem.
- Accepts the opportunity to act as a Leader in its sphere of influence, behaving as an inspiration to others and demonstrating what can be achieved for the benefit of others as well as itself.
- Understands that it will face ever-increasing speeds and volumes of change and that it must be prepared to anticipate, address and respond appropriately, embracing the challenge of managing for today, and at the same time, forecasting the future and making sure it is prepared for it.

The EFQM Model structure is based on the simple but powerful logic of asking three questions:

- **“Why”** does this organisation exist? What Purpose does it fulfil? Why this particular Strategy? (Direction).
- **“How”** does it intend to deliver on its Purpose and its Strategy? (Execution).
- **“What”** has it actually achieved to date? “What” does it intend to achieve tomorrow? (Results).

Central to the rationale of the EFQM Model, the “red thread”, is the connection between the Purpose and Strategy of an organisation and how that is used to help it Create Sustainable Value for its most important *Stakeholders and the delivery of outstanding Results.

*A Stakeholder is a person, group or organisation that has a direct or indirect stake or interest in the organisation, its activities and performance, because it can either affect the organisation or be affected by it. Examples of external Stakeholders include owners (shareholders), customers, suppliers, partners, government agencies and representatives of the community or the wider society. Examples of internal Stakeholders are people or groups of people. An outstanding organisation considers the needs, demands, requests and expectations of the Stakeholders in its ecosystem, balances them, and evaluates its performance in relation to its most important stakeholders, its “Key Stakeholders”.

1 Introducing the EFQM Model

1.4 Testimonials

Read first hand how the EFQM Model helped drive improvements with these leading companies.

BMW Plant, Munich



It all started with an idea...

Rethinking individual mobility holistically and sustainably



Dr. Robert Engelhorn,
Director, BMW plant Munich

“The EFQM Model helps us ensure consistent alignment, realisation and outcomes (why, how and what) and permeates the entire organisation. Regular self and third-party assessments allow potential for improvements to be identified.”



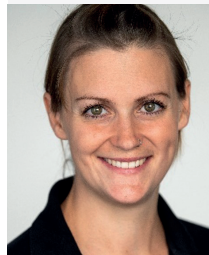
For the full case study visit efqm.org/bmw

Bosch



BOSCH

Creating a culture for innovation to thrive



Melanie Albrecht, Co-ordinator of
Continuous Improvement Process

“The new Model now also focuses on how organisations nurture their organisational culture. In my opinion, it’s very important because culture has a huge impact on productivity, but much more on innovation and creativity.”



For the full case study visit efqm.org/bosch

Skills Development Scotland



Applying skills intelligence nationwide



Damien Yeates,
CEO, Skills Development Scotland

“One of the benefits of having assessors coming in from other sectors is that they tend to always bring some fresh thinking and their experience is like gold dust. They’re like a critical friend – encouraging us to look beyond our own environment and even further towards international best practice.”



For the full case study visit efqm.org/sds

Signify



Flicking the ‘on’ switch to manage permanent change

Supporting a strategy of continuous improvement, focused on customer satisfaction



Thomas Lazer, Global Head of Quality and Business Excellence at Signify

“With the EFQM methodology, you benchmark yourself and your aspirations with the best in class to aim high and achieve your strategic goals.”



For the full case study visit efqm.org/signify

DIRECTION

Positioning statement

For an organisation to achieve and sustain outstanding results that meet or exceed the expectations of its stakeholders it:

- Defines an inspiring Purpose
- Creates a Vision that is aspirational
- Develops a Strategy that is centred on Creating Sustainable Value
- Builds a winning Culture

This Direction setting prepares the way forward for the organisation to be seen as a leader in its ecosystem and well-positioned to execute its plans for the future.

2 The EFQM Model DIRECTION

Criterion 1

Purpose, Vision & Strategy

Positioning statement

An outstanding organisation is defined by a Purpose that inspires, a Vision that is aspirational and a Strategy that delivers.

The Purpose of the organisation:

- Explains why its work is important
- Sets the scene for it to create and deliver sustained value for its stakeholders
- Provides a framework in which it takes responsibility for its contribution to, and impact on, the ecosystem in which it operates.

The Vision of the organisation:

- Describes what the organisation is attempting to achieve in the long-term
- Is intended to serve as a clear guide for choosing current and future courses of action
- Provides, along with the organisation's Purpose, the basis for setting the Strategy.

The Strategy of the organisation:

- Describes how it intends to fulfil its Purpose
- Details its plans to achieve the strategic priorities and move closer to its Vision.

1.1 Define Purpose & Vision

1.2 Identify & Understand Stakeholders Needs

1.3 Understand the Ecosystem, own Capabilities & Major Challenges

1.4 Develop Strategy

1.5 Design & Implement a Governance & Performance Management System

1.1 Define Purpose & Vision

In practice, we find that an outstanding organisation:

- Understands the importance of its Purpose being acknowledged as a force for good in its ecosystem
- Defines a Purpose that provides an inspirational motive for the importance and value of its work and is appealing to all its stakeholders
- Uses its Purpose to create an aspirational Vision that resonates with its stakeholders
- Involves its stakeholders in defining, shaping and communicating its Purpose and Vision
- Identifies areas in which outstanding and sustainable levels of performance must be achieved to fulfil the Vision.

1.2 Identify & Understand Stakeholders Needs

In practice, we find that an outstanding organisation:

- Identifies the stakeholders within its ecosystem and prioritises on those that it sees as the Key Stakeholders, i.e. those with the potential to help or hinder the achievement of the Purpose, Vision and Strategy
- Understands how its Purpose and Vision affects these Key Stakeholders
- Identifies Key Stakeholder needs and expectations, considering them within the context of the organisation's own Purpose and Vision
- Analyses the factors that influence the behaviours, relationships and decision-making of Key Stakeholders and how it may be affected by them
- Studies and understands Key Stakeholder competences and strategies and responds appropriately to how these could affect its Purpose, Vision, Strategy and business model.

1.3 Understand the Ecosystem, Own Capabilities & Major Challenges

In practice, we find that an outstanding organisation:

- Researches and understands the ecosystem, including Megatrends, and the consequences on it of the United Nations Sustainable Development Goals and Global Compact ambitions
- Analyses different scenarios and responds appropriately to any effect these may have on the organisation's Purpose, Vision, Strategy and Results
- Knows the potential of its current capabilities and develops approaches to optimise the impact they have on the organisation's Purpose, Vision, Strategy and Results
- Investigates and understands current and future market-place dynamics, their potential impact on the organisation's Purpose, Vision and Strategy and develops appropriate responses
- Assesses and evaluates the data, information and knowledge gathered from across its ecosystem to understand the major challenges for today and in the future.

1.4 Develop Strategy

In practice, we find that an outstanding organisation:

- Develops Strategy and a set of related strategic priorities that tackle any major challenges identified, making sure appropriate action is taken when necessary and actioned to set the pace within its ecosystem
- Translates Strategy and strategic priorities into performance targets and transformation initiatives
- Involves Key Stakeholders in defining the Strategy to enable subsequent engagement, deployment and communication
- Develops business models that fit with the Purpose, Vision and Strategy
- Updates and adapts the strategic priorities to reflect market trends, social networks, internal learning and information from Key Stakeholders.

1.5 Design & Implement a Governance & Performance Management System

In practice, we find that an outstanding organisation:

- Designs and implements a governance and performance management system that aligns with its aspirations and addresses the Strategy, developments in the ecosystem, own capabilities and major challenges
- Puts in place a governance structure that enables Key Stakeholders to contribute to Strategy and decision-making
- Defines and implements a governance review schedule that matches the speed of the ecosystem, monitors progress with Strategy implementation and guides performance and transformation priorities
- Ensures performance and transformation management and measurement reporting systems are built into the organisation's way of working to enable timely accountability and transparency with Key Stakeholders
- Makes sure that, as a minimum, it meets all relevant government, legal and regulatory requirements.

2 The EFQM Model DIRECTION

Criterion 2

Organisational Culture & Leadership

Positioning statement

Organisational Culture is the specific collection of values & norms that are shared by people and groups within an organisation that influence, over time, the way they behave with each other and with Key Stakeholders outside the organisation.

Organisational Leadership relates to the organisation as a whole rather than any individual or team that provides direction from the top. It is about the organisation acting as a leader within its ecosystem, recognised by others as a role model, rather than from the traditional perspective of a top team managing the organisation.

In an outstanding organisation, leadership is positioned as an activity not a role and leadership behaviours are evident across all levels and parts of the organisation. This role model leadership behaviour inspires others, reinforces, and when necessary, adapts the values and norms, helping to steer Organisational Culture.

An organisation that aspires to be recognised as outstanding, a leader within its ecosystem, achieves success through a focus on the following activities:

- 2.1 Steer the Organisation's Culture & Nurture Values
- 2.2 Create the Conditions for Realising Change
- 2.3 Enable Creativity & Innovation
- 2.4 Unite Behind & Engage in Purpose, Vision & Strategy

2.1 Steer the Organisation's Culture & Nurture Values

In practice, we find that an outstanding organisation:

- Understands and steers the Culture to align with its Purpose and recognises when there is a need for the Culture to be adapted.
- Nurtures its values, translating these into desired norms & behaviours that it promotes, communicates and clearly demonstrates through its actions.
- Demonstrates the desired behaviours for acting ethically, with integrity and a social conscience, making sure its People demonstrate these desired behaviours in their own actions.
- Expresses and promotes concern for the environment and the scarcity of resources, raising awareness of the importance of adopting a responsible approach to the environment.
- Aligns appraisal, recognition and reward systems with its values to steer it towards the organisation's desired Culture, celebrating success along the way.
- Identifies, recognises and promotes other role models from within its ecosystem that are leading the way to a more sustainable future for everyone.

2.2 Create the Conditions for Realising Change

In practice, we find that an outstanding organisation:

- Works with Key Stakeholders to create the conditions where the norm is successful change.
- Creates the conditions where a “no-blame” attitude and space for trying, making mistakes and learning from them can flourish.
- Facilitates a spirit of learning in the pursuit of its Strategy, encouraging the improvement and, at times, transformation of the organisation.
- Determines the pace of change and demonstrates through its actions, the need, benefits and consequences of any change in relation to its Purpose, Vision and Strategy.
- Learns from previous experiences of change and establishes strategies to manage change successfully.

2.3 Enable Creativity and Innovation

In practice, we find that an outstanding organisation:

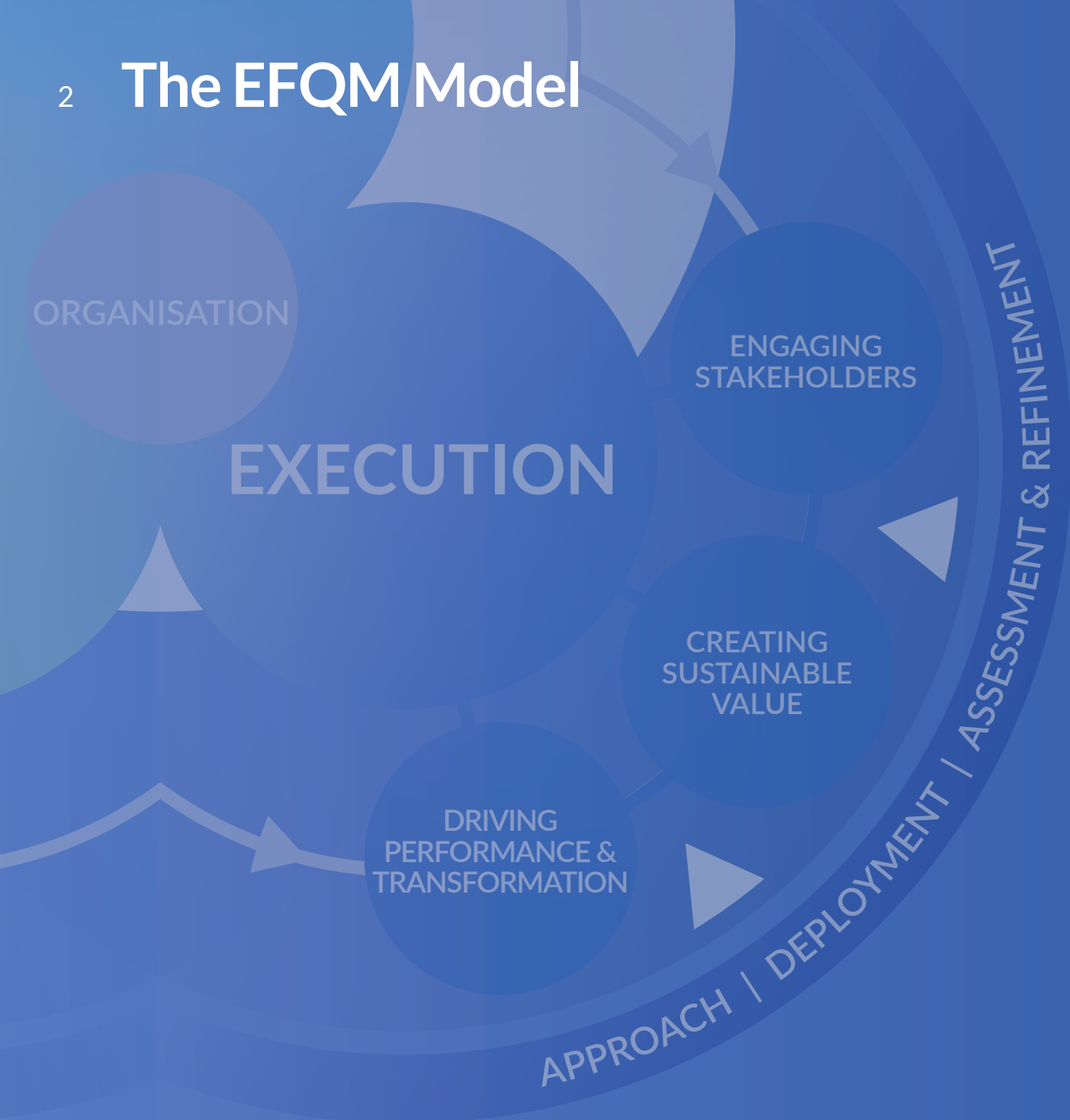
- Understands the importance and benefits of having a focus on creativity, innovation and disruptive thinking to help it achieve its Purpose, Vision and Strategy.
- Sets ambitious goals and targets that encourage creative, innovative and disruptive thinking.
- Enables a Culture where creativity, innovation and disruptive thinking is encouraged and, when a failure occurs, the cause is quickly identified and shared to avoid repetition of the same mistake happening again.
- Develops the Culture for, and expertise in, using the tools and techniques that facilitate improvement.
- Engages in learning and collaboration networks to identify opportunities for creativity, innovation and disruptive thinking.
- Seeks external benchmarking opportunities to keep pace with the latest innovation opportunities.

2.4 Unite Behind and Engage in Purpose, Vision and Strategy

In practice, we find that an outstanding organisation:

- Invests in making sure its Purpose, Vision and Strategy are communicated effectively to Key Stakeholders, helping to create an atmosphere of openness, trust, confidence and commitment.
- Encourages and shows appreciation for honest feedback on concerns related to the Purpose, Vision and Strategy.
- Conveys to Key Stakeholders the impact and relevance of their specific contributions to the Purpose, Vision and Strategy, explaining the importance of gaining and maintaining their engagement.
- Ensures its Key Stakeholders know the importance of keeping aligned to its Purpose, Vision & Strategy.
- Recognises, celebrates and shares with Key Stakeholders every moment of success to help reinforce the desired behaviours.

2 The EFQM Model



EXECUTION

Positioning statement

For an organisation to achieve and sustain outstanding results that meet or exceed the expectations of its Stakeholders it is necessary, but not sufficient, for it to:

- Define an inspiring Purpose
- Create a Vision that is aspirational
- Develop a Strategy that is centred on Creating Sustainable Value
- Build a winning Culture

The Direction setting as outlined above, prepares the way forward for the organisation, but it then needs to execute its Strategy effectively and efficiently, ensuring that it:

- Knows who the stakeholders are in its ecosystem and engages fully with those that are Key to its success
- Creates Sustainable Value
- Drives the levels of performance necessary for success today and, at the same time, drives the necessary improvement and transformation if it is to be successful in the future

2 The EFQM Model EXECUTION

Criterion 3

Engaging Stakeholders

Positioning statement

In Criterion 1, the Purpose, Vision & Strategy of an organisation is linked with identifying and understanding Stakeholder needs within the context of its unique ecosystem.

There is a clear linkage also between how an organisation executes its Engaging Stakeholders strategy (Criterion 3) and the perceptions of its performance by those Stakeholder Groups (Criterion 6) that it serves.

Because we live in an ever more dynamic and changing world, we need flexibility when assessing and scoring how an organisation executes its Engaging Stakeholders strategy.

Similarly, because there is a clear linkage between Criterion 3 and Criterion 6, we need the same flexibility in assessing and scoring not just the current Perception Results but also the future business situation and priorities of a specific organisation.

To facilitate this flexibility in assessing and scoring in both Criterion 3 and Criterion 6, a weighting factor is applied for each of five identified Stakeholder Groups.

The exact value of the weighting factor to be applied for each of the Criterion parts within C3 & C6 will be the decision of the organisation, but it must comply with the minimum and maximum weighting rules for the five recognised Stakeholder groups as shown below:

- None of the five recognised Stakeholder groups can be scored below 10% of the maximum number of points available.
- None of the five recognised Stakeholder groups can be scored above 40% of the maximum number of points available.
- Between the lower threshold of 10% and the upper threshold of 40%, organisations can decide on using weighting factors in 5% bandwidths.

Having decided the minimum and maximum weighting factor to be applied to each of these five Stakeholder Groups, and which Stakeholders are the most important to the organisation, i.e. its Key Stakeholders, independent of the specific groups identified, it is highly likely that there is a degree of similarity in applying the following principles when engaging with Key Stakeholders.

An outstanding organisation:

- Identifies the specific types and categories within each of its Key Stakeholder Groups.
- Uses its understanding of Key Stakeholders needs and expectations to achieve continued engagement.
- Involves Key Stakeholders in deploying its Strategy and Creating Sustainable Value and recognises the contributions they make.
- Builds, maintains and further develops the relationship with Key Stakeholders based on transparency, accountability, ethical behaviour and trust.
- Works with its Key Stakeholders to develop a common understanding and focus on how, through co-development, it can contribute to, and draw inspiration from, the United Nations Sustainable Development Goals and Global Compact ambitions.
- Actively gathers the perceptions of its Key Stakeholders rather than waiting for them to make contact.
- Evaluates its performance in relation to Key Stakeholders needs and decides on the appropriate actions to be taken to help secure its future, as perceived by these Key Stakeholders.

The EFQM Model

EXECUTION

In practice, we find that an outstanding organisation will include the following groups in the classification of its Key Stakeholders:

3.1 Customers: Build Sustainable Relationships

3.2 People: Attract, Engage, Develop & Retain

3.3 Business & Governing Stakeholders – Secure & Sustain Ongoing Support

3.4 Society: Contribute to Development, Well-Being & Prosperity

3.5 Partners & Suppliers: Build Relationships & Ensure Support for Creating Sustainable Value

3.1 Customers – Build Sustainable Relationships

These are the recipients of the products, services and solutions provided by the organisation. These may include:

- Direct and indirect customers.
- Users and other persons involved in the different touchpoints of a customer journey.
- Prosumers.
- Persons or groups involved in buying decisions.

In practice, we find that an outstanding organisation:

- Identifies and classifies its customers based on defined Criteria, e.g. social characteristics, needs and expectations, buying and user behaviour.
- Maintains a relationship with its customers during all stages of Creating Sustainable Value, even in those phases where there is no ongoing value creation.
- Understands the communication and contact needs of the different customer segments.
- Establishes communication channels that make it easy for customers to interact, give feedback on their experiences and for the organisation to react quickly and appropriately.

3.2 People – Attract, Engage, Develop & Retain

These are the individuals or groups of people that are employed by the organisation.

In practice, we find that an outstanding organisation:

- Develops a People Strategy and plans that support the overall Strategy and plans of the organisation.
- Adapts to the evolving needs and expectations of its People, both current and future, taking account, for example, of changing expectations on Organisational Culture & Leadership, gender balance & parity, diversity & inclusion and the desired working environment.
- Enables its People – based on Purpose, Vision & Strategy – to understand the need for change and to see the opportunities for further development of their knowledge and capabilities.
- Empowers its People to communicate and to share effectively their experiences and learning with others in the ecosystem.
- Creates an ambiance in which its People can thrive, and their well-being is supported.
- Ensures its People are proactively guided, rewarded, recognised and cared for.

3.3 Business & Governing Stakeholders – Secure & Sustain Ongoing Support

These are the individuals or groups to whom the organisation is accountable in relation to its fiscal, legal, ethical and general stewardship requirements.

- Business stakeholders can include owners, shareholders, investors, funding organisations.
- Governing stakeholders can include government departments, regional or local bodies (statutory & regulatory), public authorities or parastatal institutions.

In practice, we find that an outstanding organisation:

- Identifies the Key Business and Governing Stakeholders that have a financial, legal and general stewardship interest in the organisation and understands their expectations.
- Involves Key Business and Governing Stakeholders in the development of its improvement & transformation ambitions and overall strategic direction.
- Makes sure the relationships established with Key Business and Governing Stakeholders are mutually beneficial.
- Makes itself transparent and accountable to this Key Stakeholder group, establishing and maintaining high levels of trust at all times.

3.4 Society – Contribute to Development, Well-Being & Prosperity

These are the individuals or groups outside the organisation that represent the immediate community or the wider society, including, for example, Special Interest Groups that focus on topics such as the environment.

In practice, we find that an outstanding organisation:

- Uses its Purpose, Vision & Strategy to develop a clear understanding and focus on how it will contribute to its Society.
- Establishes, develops and maintains a relationship with the Key Stakeholders in its Society, leading to mutual benefit for both the organisation and its Society.
- Utilises communication channels that make it easy for its Society to interact, give feedback on their experiences and for the organisation to react quickly and appropriately.
- Makes itself transparent and accountable to this Key Stakeholder group and establishes and maintains a high level of trust.

3.5 Partners & Suppliers – Build Relationships & Ensure Support for Creating Sustainable Value

These are the external parties that the organisation chooses to work with to fulfil its Purpose, achieve the Vision, deliver the Strategy and reach shared objectives that benefit both parties.

In practice, we find that an outstanding organisation:

- Segments its Key Partners and Suppliers in line with its Purpose, Vision and Strategy.
- Ensures its Key Partners and Suppliers act in line with the organisation's Strategy and that mutual transparency, integrity, and accountability in the relationship is established and enhanced.
- Builds a trusting relationship with its Key Partners and Suppliers to support the objective of Creating Sustainable Value.
- Works proactively with its Key Partners and Suppliers to leverage the Culture and expertise of both parties to achieve mutual benefit.

2 The EFQM Model EXECUTION

Criterion 4

Creating Sustainable Value

Positioning statement

An outstanding organisation recognises that Creating Sustainable Value is vital for its long-term success and financial strength.

The organisation's clearly defined Purpose, enriched by the Strategy, defines for whom the organisation should be Creating Sustainable Value. In most cases, customers, segmented appropriately, are the target group for Creating Sustainable Value, although some organisations might also focus on selected Key Stakeholders within its Society or Business & Governing Stakeholder segments.

An outstanding organisation acknowledges that Key Stakeholder needs may change over time and that it is important to collect and analyse feedback to improve or change their products, services or solutions.

The different elements to Creating Sustainable Value are shown below in a step by sequence. It is recognised that the organisation's plans for today and the future may well run in parallel or overlap at times, depending on the nature of the organisation's business.

4.1 Design the Value & How it is Created

4.2 Communicate & Sell the Value

4.3 Deliver the Value

4.4 Define & Implement the Overall Experience

4.1 Design the Value & How it is Created

In practice, we find that an outstanding organisation:

- Understands what differentiates it from others, including, where relevant, its competitors, and makes these differentiators an integral part of the value it creates.
- Involves its Key Stakeholders in the development process to (co-)create and maximise value.
- Develops the portfolio of its products, services and solutions in line with its Purpose and the current and future needs of existing and potential target groups.
- Designs the value and the value creation approaches to reflect their lifecycle in a responsible way, considering impacts on public health, safety and the environment.
- Uses quantitative and qualitative market research, (customer) surveys and other forms of feedback, as well as insights, to develop and improve its value proposition and value creation.

4.2 Communicate & Sell the Value

In practice, we find that an outstanding organisation:

- Expresses the differentiators and the value propositions into attractive and engaging messages that are then communicated to existing and potential customers as well as other target groups.
- Leverages the power of networking and influencing in the on-line and off-line worlds in a responsible manner to increase the positive image of the organisation, its differentiators and its value proposition.
- Uses dedicated strategies and approaches to sell to target groups its differentiators and the value proposition(s) as well as the products, services and solutions.
- Makes it easy for its target groups to work with the organisation by offering support, both before and after they decide to do business, thus facilitating the successful selling of the value proposition.

4.3 Deliver the Value

In practice, we find that an outstanding organisation:

- Implements effective and efficient ways to create value, making sure it can consistently deliver on its Purpose and value propositions.
- Delivers sustainable value, as promised, through its portfolio of products, services and solutions and by meeting or exceeding the needs and expectations of its target groups.
- Delivers its products, services and solutions in a way that minimises negative social and environmental impact.
- Advises its target groups of the responsible use of its products, services and solutions.

4.4 Define & Implement the Overall Experience

In practice, we find that an outstanding organisation:

- Uses insights about the target groups for defining and implementing the overall experience in working with the organisation.
- Puts in place a consistent, seamless and effective progression through the different phases of value creation, incorporating relevant measures at appropriate touchpoints in this journey.
- Takes advantage of opportunities to personalise the overall experience for its target groups, as well as the specific products, services and solutions.
- Makes sure its people have the necessary resources, competencies and empowerment they need to maximise the overall experience for its target groups.
- Designs, implements and uses timely feedback systems to improve the different phases of value creation as well as the products, services and solutions offered by the organisation.

2 The EFQM Model EXECUTION

Criterion 5

Driving Performance & Transformation

Positioning statement

Now and in the future, an organisation needs to be able to meet the following two important requirements at the same time to become and remain successful.

On the one side, it needs to continue managing successfully the delivery of its current business operations. (“Driving Performance.”)

On the other side, there are constant changes inside and outside the organisation that need to be managed in parallel if it is to remain successful. (“Driving Transformation.”)

The combination of Driving Performance & Transformation confirms the necessity for the organisation to deliver for today while preparing for the future.

Major elements in enabling performance & transformation are innovation and technology, the ever-increasing importance of data, information & knowledge and the focussed use of critical assets and resources.

- 5.1 Drive Performance & Manage Risk
- 5.2 Transform the Organisation for the Future
- 5.3 Drive Innovation & Utilise Technology
- 5.4 Leverage Data, Information & Knowledge
- 5.5 Manage Assets & Resources

5.1 Drive Performance & Manage Risk

In practice, we find that an outstanding organisation:

- Uses the performance management system to ensure a coherent link between its Purpose, Strategy, Sustainable Value Creation objectives and Results.
- Uses the performance management system to guide informed, effective, responsive and fact-based improvements.
- Manages projects and improves processes based on information from its performance management system.
- Identifies risk and assesses the potential impact on the strategic priorities, the way things are executed and the desired results as well as potential opportunities.
- Develops and implements plans to manage risk from different perspectives such as cultural, strategic, operational, financial, legal, regulatory, societal and technical (including risks from IT and cyber security challenges) dimensions.

5.2 Transform the Organisation for the Future

In practice, we find that an outstanding organisation:

- Identifies the transformation and change needs, taking into account its Purpose, Strategy, Sustainable Value Creation objectives and Results and scanning its ecosystem to forecast the main challenges and opportunities for the future.
- Adapts current Strategy and existing business models to meet future needs, and implements new business models based on the challenges and opportunities that are forecast.
- Builds its Organisational structure to best serve its Purpose, Vision and Strategy and considers innovative approaches to adapting its current Organisational design based on the main challenges and opportunities that are forecast.
- Establishes and utilises agile working approaches, at the same time providing the necessary stability to manage current operations.
- Restructures in a timely manner its value creation and other Organisational processes based on operational and future needs.

5.3 Drive Innovation & Utilise Technology

In practice, we find that an outstanding organisation:

- Provides the capabilities, resources and tools that develop and sustain creativity, innovation and disruptive thinking.
- Takes advantage of innovations that support improvement in the current business and the need for transformation in the future.
- Evaluates and exploits the potential that new technologies have to support ongoing value creation, improvements to its infrastructure and the responsiveness and adaptability of its processes & projects.
- Introduces relevant developments in technology at a speed that maximises the benefit to be gained.
- Evaluates and manages, based on circular economy principles, the full lifecycle of existing and emerging technologies, to maximise the benefit for all.

5.4 Leverage Data, Information & Knowledge

In practice, we find that an outstanding organisation:

- Ensures it has identified the data it needs to support its transformation plans as well as managing the products, services and solutions it currently offers, and is proficient in acquiring any essential information that may be lacking.
- Uses advanced analytics, including predictive models, to extract value from data, gain actionable insights and make informed decisions.
- Converts data into information and knowledge and uses the outcomes to identify potential opportunities for creating further sustainable value.
- Makes use of the knowledge held by Key Stakeholders to generate ideas and innovations, including the potential for working together, to develop products, services and solutions that create sustainable value.
- Ensures that data, information and knowledge are treated and used in an ethical way, respecting the needs and rights of those providing the data, information and knowledge.
- Secures, protects and maximises the unique knowledge, such as the intellectual property, that it owns.

5.5 Manage Assets & Resources

In practice, we find that an outstanding organisation:

- Uses financial resources in a balanced and sustainable way to help ensure current success and investment in the future.
- Identifies and manages responsibly, the critical assets and resources that are vital for its Strategy, Performance and Transformation needs, including financial assets (cash, capital, investments), tangible assets (trading infrastructure, such as supply chain, real estate, technology and machinery) and intangible assets (proprietary data, self-developed software/technology, brand, goodwill, patents).
- Discovers and embeds coherent and innovative ways to maximise the value of its assets & resources to enhance performance and transformation objectives in line with changing organisational and market demands, both short and long term.
- Determines the assets and resources it no longer needs (for current or future business) and, based on Circular Economy principles, disposes of them responsibly.

RESULTS

Positioning statement

What the organisation has achieved in relation to what has been described in the Direction & Execution sections, including the forecast for the future. In practice, we find that an outstanding organisation provides results data for:

- Stakeholder Perceptions
- Creating Sustainable Value
- Driving Performance & Transformation

2 The EFQM Model RESULTS

Criterion 6

Stakeholder Perceptions

Positioning statement

This Criterion concentrates on results based on feedback from Key Stakeholders about their personal experiences of dealing with the organisation – their *perceptions*.

These perceptions could relate to past as well as current Key Stakeholders and could be obtained from a number of sources, including surveys, focus groups, ratings, press or social media, external recognition, advocacy, structured review meetings, investor reports and compliments/ complaints, including feedback compiled by customer relationship management teams.

In addition to the perceptions that a Key Stakeholder may have of an organisation based on personal experiences, perceptions may also be shaped by the environmental and social impact reputation of the organisation. For instance, the degree to which the organisation is perceived by its Key Stakeholders as contributing successfully to one or more of the United Nations Sustainable Development Goals and Global Compact ambitions.

As fully described in Criterion 3 there is a clear linkage between how an organisation executes its Engaging Stakeholders Strategy and the Perceptions of the Stakeholder Groups that it serves (Criterion 6). The weighting factor decided by the organisation and applied for each of the five different Stakeholder Groups is set in Criterion 3 and mirrored in Criterion 6.

In practice, we find that an outstanding organisation:

- Knows how successful it is at executing its Strategy to meet the needs and expectations of its Key Stakeholders.
- Uses its analysis of past and current performance to predict future performance.
- Uses Key Stakeholder Perception Results to stay informed and influence its current Direction and the Execution of its Strategy.

The EFQM Model

RESULTS

Examples of Key Stakeholder Perception Results and topics to be covered *could include, but are not listed in any priority order or limited to:*

6.1 Customer Perception Results

6.2 People Perception Results

6.3 Business & Governing Stakeholders Perception Results

6.4 Society Perception Results

6.5 Partners & Suppliers Perception Results

6.1 Customer Perception Results

What the perceptions of the Customers are in relation to, for instance:

- The delivery of the overall customer experience.
- The Culture of the organisation; the attitude and level of commitment to the customer by People.
- The branding and reputation of the organisation, including its social and environmental performance.
- The products, services and solutions offered by the organisation.
- The use of innovation to improve the organisation's processes, products, services and solutions.
- The usage of technology by the organisation to help deliver sustainable value.
- The delivery and after-sales support for the different channels.
- The effectiveness and efficiency of the communication channels used.

6.2 People Perception Results

What the perceptions of the People are in relation to, for instance:

- The Culture of the organisation.
- Their experience of working for the organisation, including how change is managed.
- The organisation's commitment and achievements concerning gender balance, parity, diversity and inclusion.
- The way the organisation is adapting to future ways of working, for example, the co-existence of People working alongside robots, the use of artificial intelligence and augmented & virtual reality.
- The organisation's support for family and personal life.
- The organisation's support, empowerment, recognition and development.
- The working environment, pay and benefits.
- The management and improvement of personal performance.
- The reputation of the organisation, including as a Leader in its ecosystem.
- Communication within the organisation.
- Talent attraction and engagement.
- The way in which Strategy is executed, their contribution to it and their degree of confidence in the future direction of the organisation.

6.3 Business & Governing Stakeholders Perception Results

What the perceptions of the Business and Governing Stakeholders are e.g. owners, shareholders, investors, funding organisations, government departments, regional or local bodies (statutory & regulatory), public authorities or parastatal institutions, in relation to, for instance:

- The financial management, security and sustainability of the organisation.
- The governance structure, transparency, accountability and ethical behaviour of the organisation.
- The social and environmental responsibility of the organisation.
- The management of risk and compliance.
- The branding and reputation of the organisation.
- The products, services and solutions offered by the organisation and its approach to innovation in processes, products, services and solutions.
- The ability of the organisation to scan the horizon, spot megatrends and deal with them successfully.
- Their overall experience of dealing with the organisation.

6.4 Society Perception Results

What the perceptions of its Society are, be it local, national or international, in relation to, for instance:

- The organisation's ability to meet the expectations of its Society.
- The impact the governance of the organisation and the degree of transparency and ethical behaviour have on the community.
- The impact the operations of the organisation has on the community.
- The sustainability of the organisation's contributions to the community in terms of its economic, social and environmental practices.
- The organisation's commitment to move towards a Circular Economy.
- The organisation's commitment to, and achievements in, reducing inequality, increasing diversity & inclusion and achieving a gender balance.

6.5 Partners & Suppliers Perception Results

What the perceptions are of the Key Partners & Suppliers in relation to, for instance:

- Their experience of dealing with the organisation.
- The commitment and achievement of the organisation to co-creation and working towards mutual benefit.
- The rate of implementation of new technologies and changes.
- The social commitment of the organisation.
- The organisation's commitment and achievement to move towards a Circular Economy.
- The management and improvement of Key Partners & Suppliers performance.
- Communication and relationship management with the organisation.
- The governance structure, transparency and ethics of the organisation and its practices.
- The sustainability of the relationship between the organisation and the Key Partners and Suppliers.

2 The EFQM Model RESULTS

Criterion 7

Strategic & Operational Performance

Positioning statement

This Criterion concentrates on results linked to the organisation's performance in terms of:

- The ability to fulfil its Purpose, deliver the Strategy and Create Sustainable Value
- Its fitness for the future.

These results are used by the organisation to monitor, understand and improve its overall performance and to forecast the impact this performance will have on both the perceptions of its Key Stakeholders as well as its future strategic ambitions.

In practice, we find that an outstanding organisation:

- Uses both financial and non-financial indicators to help it measure its Strategic and Operational Performance.
- Understands the linkages between Key Stakeholder Perceptions and actual performance and is able to predict, with a high degree of certainty, how future performance will evolve.
- Considers the current and future needs and expectations of its Key Stakeholders when deciding on the most appropriate performance indicators to match its Strategic & Operational objectives.
- Understands the cause and effect relationships that impact on performance and uses the results achieved to stay informed and influence its current Direction & Execution.
- Uses the results currently being achieved to forecast its future performance with an expected degree of certainty.

Strategic and Operational Performance indicators could include the reported results and forecasts used to show how well the organisation is achieving its strategic goals and the reported indicators and forecasts used to show how well the organisation is achieving its operational targets. The indicators could include, but are not limited to, the following examples:

Achievements in delivering Purpose, Strategy & Creating Sustainable Value

- Achievement of key strategic targets & key performance indicators
- Achievement of transformation goals

Fulfilment of Key Stakeholder Expectations

- Product and service delivery indicators
- Customer service
- Complaints handling
- Market share
- Training and career development
- People performance management, appraisal
- Environmental & societal activities
- Health and safety performance
- Partner and supplier performance

Economic & Financial Performance

- Revenue
- Profit
- Cash flow
- Inventory turnover
- Earnings Before Interest, Taxes, Depreciation, and Amortisation (EBITDA)
- Investments/Return on Investment
- Project cost
- Budget adherence
- Efficiency in the use of financial resources

Achievement in Driving Performance & Transformation

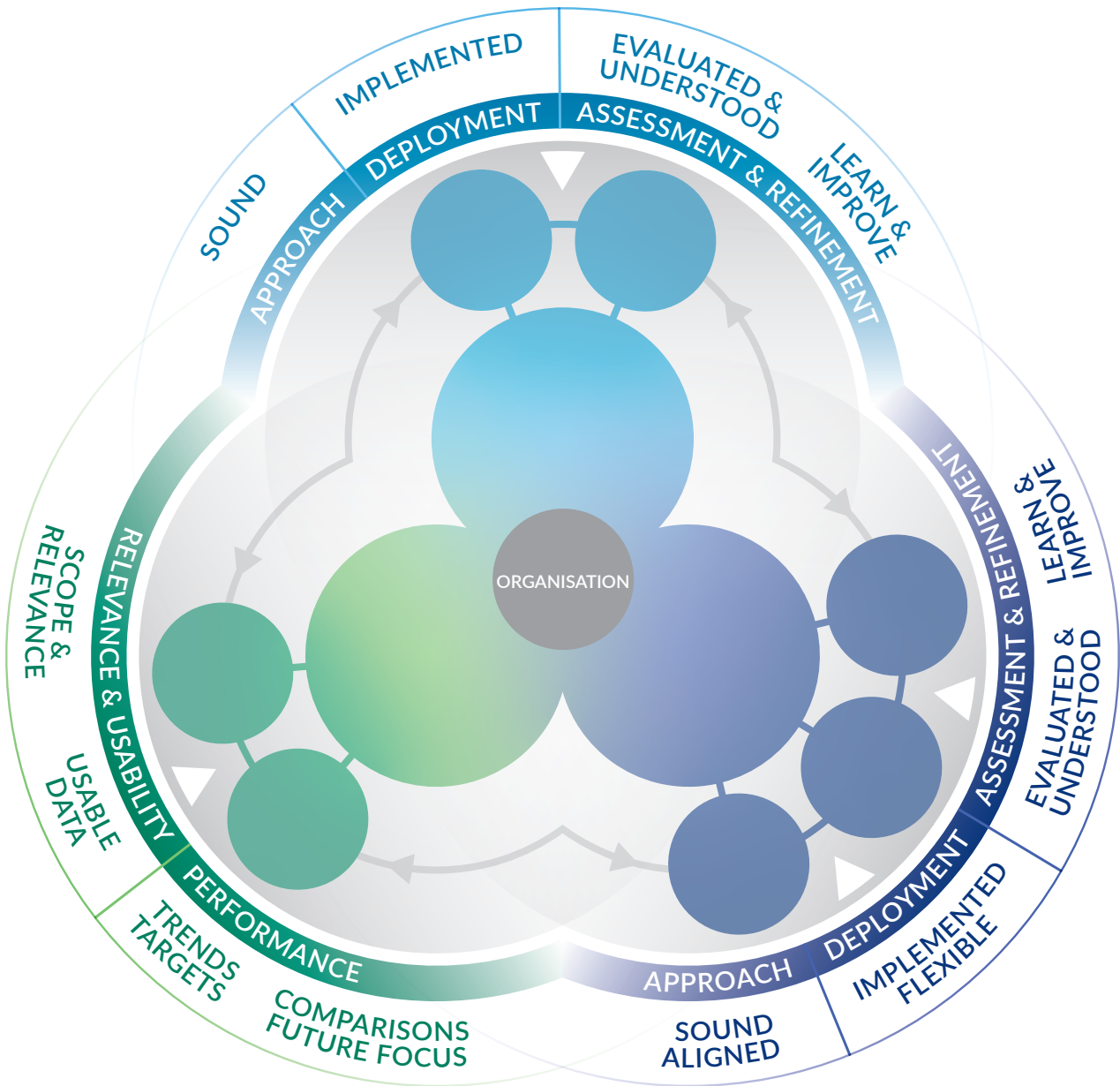
What the perceptions of its Society are, be it local, national or international, in relation to, for instance:

- Performance indicators
- Key process indicators (efficiency, effectiveness)
- Change Management performance
- Innovation achievements

Predictive Measures for the Future

- Analysis of performance patterns & data sets
- Projections of existing results
- Leading & lagging indicator dynamics
- Future forecasts

The EFQM Diagnostic Tool: RADAR



3.1 Introduction

RADAR is the acronym that EFQM uses to describe the logic behind the diagnostic tool it has developed to help any organisation:

- Better manage its current way of working.
- Diagnose its current strengths and opportunities for improvement.

At its highest level, the **RADAR** logic states that an organisation needs to:

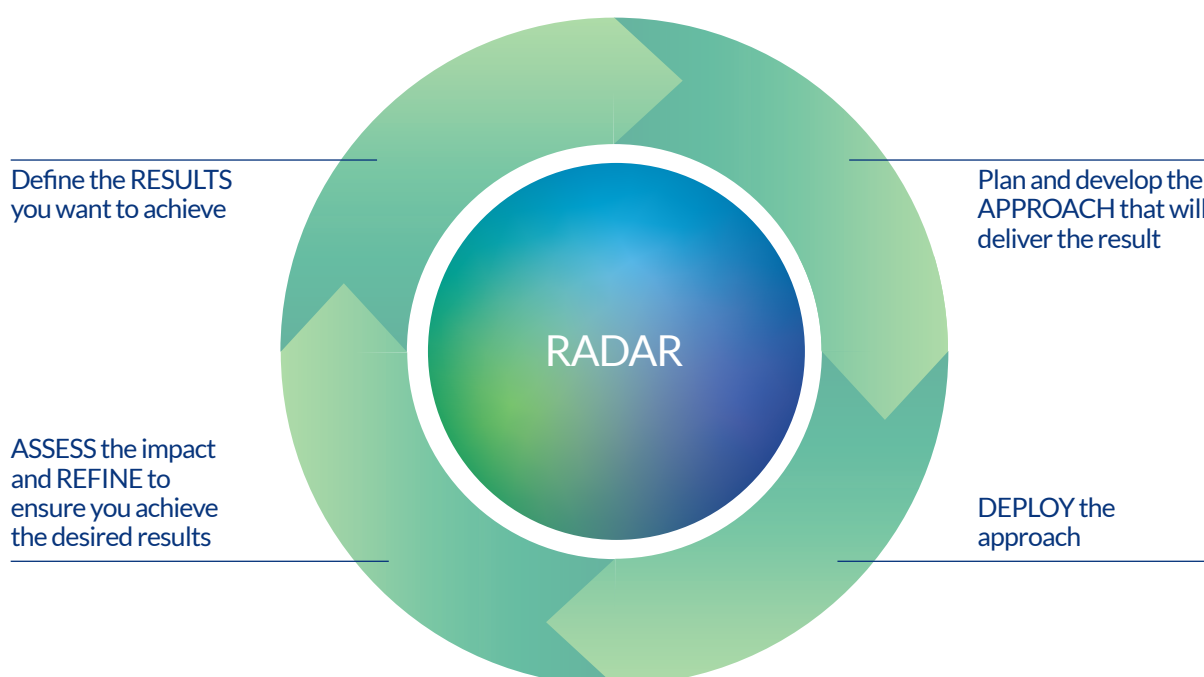
- Determine the **R**esults it is aiming to achieve as part of its Strategy.
- Have in place an **A**pproach that will deliver the required result, both now and in the future .
- **D**eploy this approach appropriately.
- **A**ssess and **R**efine the deployed approach to learn and improve.

To help deliver a more robust analysis, the RADAR elements are broken down into a number of Attributes and with each Attribute there is an associated description that expands upon what is meant and what the organisation should be able to clearly demonstrate.

See Matrix Charts 1 – 3 on the following pages.

An individual or a team can use the RADAR logic at the Attribute level, in conjunction with the EFQM Model:

- To help identify where an organisation's current strengths and opportunities for improvement exist.
- To help an organisation describe its future in terms of the desired results and the necessary actions that need to be taken to achieve those desired results.



3 The EFQM Diagnostic Tool: RADAR

3.2 Applying RADAR for Direction & Execution

Matrix Chart 1 shown below is used to support the analysis of the Approach within Criterion 1 (Purpose, Vision & Strategy) and Criterion 2 (Organisational Culture & Leadership).

N. B. Note that for Direction, the “Aligned” and “Flexible” Attributes are not used

Matrix Chart 1: Analysis of Direction		
Elements	Attributes	Description
Approach	Sound	The Approach has a clear rationale, aims to fulfil and respond to Key Stakeholder needs, is described appropriately and is designed to be fit for the future.
	Aligned	<i>N.B. Not applied to Direction</i>
Deployment	Implemented	The Approach is Deployed in relevant areas in an effective and timely manner.
	Flexible	<i>N.B. Not applied to Direction</i>
Assessment & Refinement	Evaluated & Understood	Feedback on the effectiveness & efficiency of the Approach and its Deployment are collected, understood and shared.
	Learn & Improve	Findings from emerging trends analysis, measurement, learning and benchmarking are used to inspire creativity and generate innovative solutions to improve performance in appropriate timescales.

Scoring: RADAR for Direction

		Inability to achieve	Limited ability to achieve			Ability to achieve			Comprehensive ability to achieve		Outstanding ability to achieve	
		0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
Approach	Sound	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
Deployment	Implemented	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
Assessment & Refinement	Evaluated & Understood	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
	Learn & Improve	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
Overall score (not higher than the score for ‘Sound’)		0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%

N.B. RADAR for Direction: Please see Section 3.4 for more information on scoring.

Matrix Chart 2 shown below is used to support the analysis of the Approach within Criterion 3 (Engaging Stakeholders), Criterion 4 (Creating Sustainable Value) and Criterion 5 (Driving Performance & Transformation).

Users of the RADAR logic should apply the Attributes described in the appropriate charts below to the information presented in Direction & Execution, respectively.

The descriptions associated with each Attribute provide guidance on what the organisation should be looking to demonstrate.

Matrix Chart 2: Analysis of Execution		
Elements	Attributes	Description
Approach	Sound	The Approach has a clear rationale, aims to fulfil and respond to Key Stakeholder needs, is described appropriately and is designed to be fit for the future.
	Aligned	The Approach supports an organisation's Direction and is integrated with other relevant approaches.
Deployment	Implemented	The Approach is Deployed in relevant areas in an effective and timely manner.
	Flexible	The Execution enables flexibility and adaptation.
Assessment & Refinement	Evaluated & Understood	Feedback on the effectiveness & efficiency of the approach and its deployment are collected, understood and shared.
	Learn & Improve	Findings from emerging trends analysis, measurement, learning and benchmarking are used to inspire creativity and generate innovative solutions to improve performance in appropriate timescales.

Scoring: RADAR for Execution

Approach		Inability to achieve	Limited ability to achieve			Ability to achieve			Comprehensive ability to achieve		Outstanding ability to achieve	
		0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
Approach	Sound	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
	Align	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
Deployment	Implemented	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
	Flexible	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
Assessment & Refinement	Evaluated & Understood	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
	Learn & Improve	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
Overall score (not higher than the score for 'Sound')		0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%

N.B. RADAR for Execution: Please see Section 3.4 for more information on scoring.

3 The EFQM Diagnostic Tool: RADAR

3.3 Applying RADAR for Results

The RADAR Matrix Chart shown below is used to support the analysis of Criterion 6 (Stakeholder Perceptions) and Criterion 7 (Strategic & Operational Performance).

Users of the RADAR logic should apply the Attributes described in the chart below to the evidence presented.

Typically, this evidence will be data sets that show Perception Results or Strategic and Operational Performance, presented in response to the titles of Criterion-parts 6.1 to 6.5 and Criterion 7. The descriptions associated with each Attribute provide guidance on what the organisation should be looking to demonstrate.

Matrix Chart 3: Analysis of Results		
Elements	Attributes	Description
Relevance & Usability	Scope & Relevance	A set of results that clearly link to the Purpose, Vision & Strategy of the organisation are identified. The selected set of Results is reviewed and improved over time.
	Usable Data	Results are timely, reliable, accurate and appropriately segmented to provide meaningful insights that support performance improvement and transformation.
Performance	Trends	Positive trends or sustained outstanding performance over the strategic period/cycle.
	Targets	Relevant targets are set in line with the Strategy and are consistently achieved.
	Comparisons	Relevant external comparisons suitable to position own performance in line with the strategic direction are made and are favourable.
	Future Focus	Based on current cause & effect relationships, analysis of data sets, performance patterns & predictive measures, the organisation understands the drivers for outstanding performance in the future.

Scoring: RADAR for Results

		Inability to achieve	Limited ability to achieve			Ability to achieve			Comprehensive ability to achieve		Outstanding ability to achieve	
		0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
Relevance & Usability	Scope & Relevance	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
	Usable Data	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
Performance	Trends	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
	Targets	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
	Comparisons	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
	Future Focus	0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%
Overall score (not higher than the score for 'Scope & Relevance')		0%	10%	20%	30%	40%	50%	60%	70%	80%	90%	100%

N.B. RADAR for Results: Please see Section 3.4 for more information on scoring.

3.4 Scoring using the RADAR Matrix Charts

You will have seen at the bottom of Matrix Charts 1-3 a simple scoring chart in 10% divisions that aligns with the associated RADAR Attributes. We have included these charts because many organisations value allocating a numerical value to their continuous improvement efforts. It should also be noted that it is not mandatory that an organisation must score itself when self-assessing using the EFQM Model and RADAR. The one situation where scoring is mandatory is when an organisation applies to EFQM, or one of its Certified Recognition Organisation Partners, for external recognition (see Section 11).

EFQM and its Certified Recognition Organisation Partners run programmes that recognise those organisations who, when assessed against the Criteria of the EFQM Model, can demonstrate outstanding, sustainable performance.

Organisations applying for recognition, when assessed against the EFQM Model, are scored out of 1000 points. The 1000 points are divided across the seven Criteria, as illustrated in the graphic below.



3 The EFQM Diagnostic Tool: RADAR

3.4 Scoring using the RADAR Matrix Charts

The scoring of Criterion 3 and Criterion 6 has already been addressed in the earlier pages of this brochure.

When using the RADAR Matrix Charts to score an organisation's performance in the remaining Criteria, there is a difference in approach between scoring Criteria 1, 2, 4, 5 and scoring Criterion 7.

In Criterion 7 (Strategic & Operational Performance) there are no Criterion parts and so the 200 points available are allocated at the level of Criterion 7.

Because Criterion 1, 2, 4 and 5 are segmented into Criterion parts, the points allocated to each particular Criterion, as shown on the graphic on the previous page, are allocated equal weight within that Criterion.

For example:

- Each of the 5 Criterion parts in Purpose, Vision & Strategy contribute 20% of the 100 points allocated to Criterion 1
 - a. 1.1 = 20 points
 - b. 1.2 = 20 points
 - c. 1.3 = 20 points
 - d. 1.4 = 20 points
 - e. 1.5 = 20 points
- Each of the 4 Criterion parts in Creating Sustainable Value contribute 25% of the 200 points allocated to Criterion 4
 - a. 4.1 = 50 points
 - b. 4.2 = 50 points
 - c. 4.3 = 50 points
 - d. 4.4 = 50 points

When following the EFQM assessment approach and using the RADAR logic to score, there are two clear rules to be applied, one in association with Direction & Execution, the other with Results:

- When scoring any of the Criterion parts in Direction & Execution, the overall score in that Criterion part should not exceed that of the score given to the soundness of the approach. No matter how well all other Attributes have been scored in that Criterion part, the score derived for Sound is the “Master” of the others.
- When scoring Results (Criteria 6 & 7), the overall score in Criterion parts 6.1 to 6.5 and the overall score in Criterion 7 must not exceed that of the “Scope and Relevance.” No matter how well all other Attributes have been scored in Criterion 6 & 7, the score derived for Scope and Relevance is the “Master” of the others.

Organisations interested in gaining external recognition for their achievements are assessed by a team of EFQM trained Assessors, using these RADAR Matrix Charts.

The three RADAR Matrix Charts can also be used by organisations wanting to Self-Assess against the EFQM Model, producing a numerical value at the same time as producing a set of strengths and opportunities for improvement.

The attraction for an organisation to produce an overall score using the 1000 point scale as part of its Self-Assessment, as well as gaining a scoring profile against each of the seven Criteria, is that it offers an opportunity to compare with other organisations who also use the EFQM Model and RADAR logic. It also gives the organisation a starting point from which it can measure its progress, or regression, against the outcomes from future Self-Assessments.

4 EFQM RADAR Guidelines

4.1 RADAR Guidelines for Direction & Execution

APPROACH	Guidance	The applicant needs to achieve:
Sound	The approach has a clear rationale, aims to fulfil and respond to Key Stakeholder needs, is described appropriately and is designed to be fit for the future.	<ul style="list-style-type: none"> • There is a clear reason to support the choice of the approach in place – what was the rationale behind choosing and/or adopting a specific approach, for instance, by means of research, learning or benchmarking? • The approach is appropriately described for those needing to understand it e.g. is it visualised, did the 'ways of working' change over time? • The approach is focussed on the Key Stakeholder expectations and everyone involved in the execution of it (both Strategic and Operational e.g. those who benefit from it and also those who use the approach). • The approach already shows signs of maturity or is a proven practice, e.g. because the changes made became smaller over time, or the approach has been shown to work also in abnormal or difficult circumstances. • The approach is designed to be fit for the future and can be adapted to changing circumstances.
Aligned	The approach supports an organisation's direction and is integrated with other relevant approaches.	<ul style="list-style-type: none"> • The approach is designed to deliver the desired results (now and in the future), and it is aligned with the organisation's direction. • There is a visible/logical link with the Strategy, and the approach supports one or more strategic objectives. • The people choosing the approach are aligning it with one or more facets of the Strategy, while also considering dependencies from and/or impact on other approaches.
DEPLOYMENT		
Implemented	The approach is deployed in relevant areas in an effective and timely manner.	<ul style="list-style-type: none"> • The extent to which the approach has been used and is put into practice. This may relate to different levels within an organisation's hierarchy; different locations; the number of actual implementations based on the approach; the number of employees actively involved or the various products, services and solutions being offered. • There is an awareness of the further potential for deployment in-depth and/or breadth. • Some facts & figures exist to show how often the approach is used, how the use has varied over time and why.
Flexible	The execution enables flexibility and adaptation.	<ul style="list-style-type: none"> • There is a plan and timing for the actual deployment that allows flexibility and adaptation according to changing circumstances. • Example(s) exist where the circumstances required temporary or definitive evolutions, small or big.
ASSESSMENT & REFINEMENT		
Evaluated & Understood	Feedback on the effectiveness & efficiency of the approach and its deployment is collected, understood and shared.	<ul style="list-style-type: none"> • There is a view for the specific approach on the effectiveness (achieving the desired output) and efficiency (cost in resources/time/money). • There is a way to know how frequently measuring and collecting feedback should be done e.g. what is a good fit. • Feedback is analysed, understood and shared with relevant stakeholders in and outside the organisation.
Learn & Improve	Findings from emerging trends analysis, measurement, learning and benchmarking are used to inspire creativity and generate innovative solutions to improve performance in appropriate timescales.	<ul style="list-style-type: none"> • Actions to understand future emerging trends and their potential impact are taken. • There is knowledge resulting from learning activities and comparisons to understand if the approach can be considered as 'outdated', 'normal', 'better' or 'outstanding'. • There is an awareness of the potential for further improvement (incremental or radical breakthrough e.g. continuous improvement/change/transformation). • The measurement and learning from above lead to real improvements and are visible in the results. • There is a way to select and only act on the best ideas and proposals, not on all of them, e.g. based on the understanding of the limitations in time, resource and capabilities when translating ideas to practice.

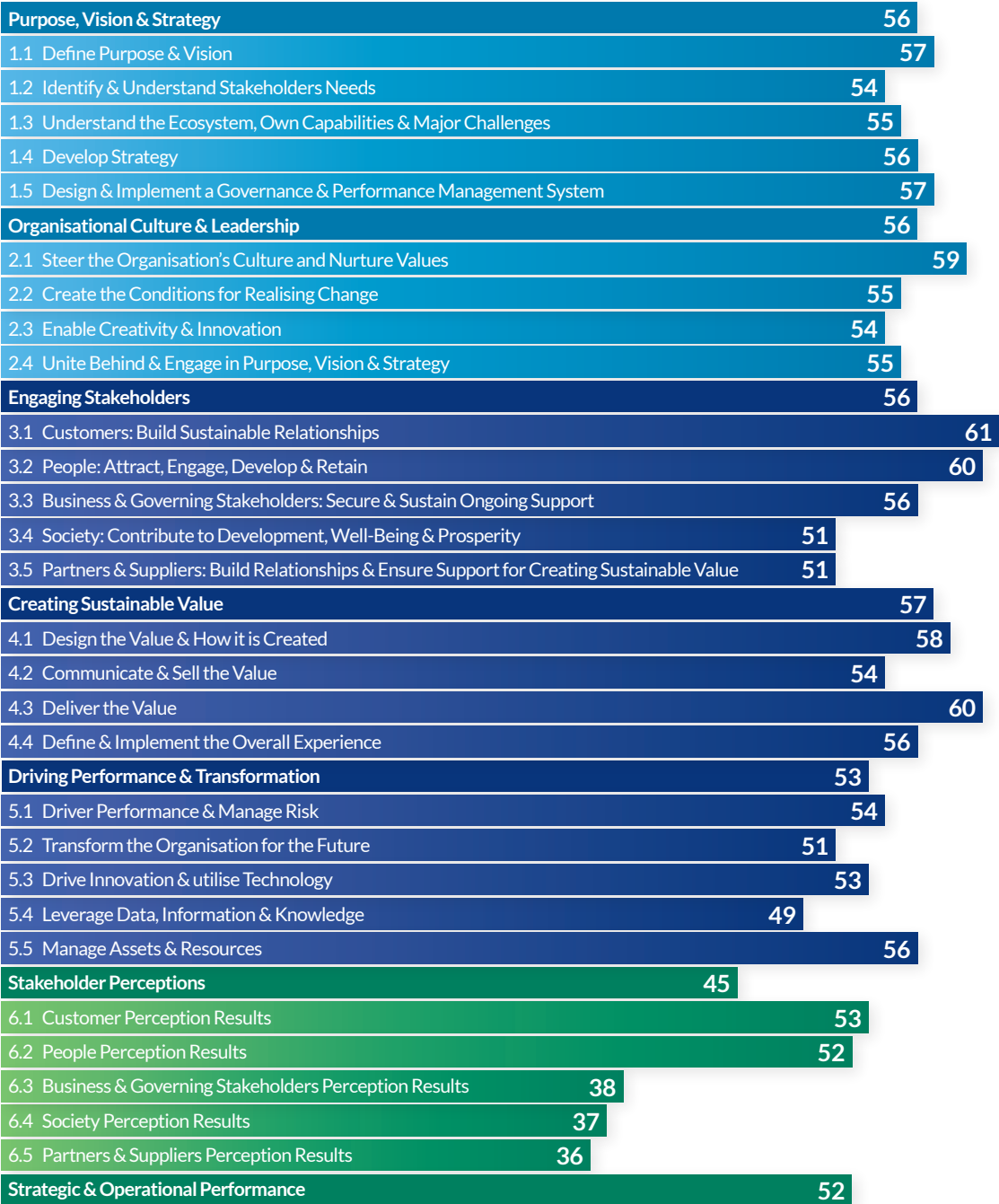
4.2 RADAR Guidelines for Results

RELEVANCE & USABILITY	Guidance	The applicant needs to achieve:
Scope & Relevance	A set of results that clearly link to the Purpose, Vision & Strategy of the organisation are identified. The selected set of results is reviewed and improved over time.	<ul style="list-style-type: none"> The organisation is clear about what it needs to measure/achieve/manage to deploy its Strategy and understand its impact on Key Stakeholder Perceptions and Strategic/Operational Performance (understand how the selection and prioritisation of results is decided upon). The prioritised measures/results used are meaningful within the context of the Direction and Strategy. When using the results to understand 'the footprint', impact and performance of the organisation, what is the way to make a difference between the essential, not so essential and non-important results to look at? What kind of understandable and useful insights exist on how the various results are related to each other? If both the effectiveness and efficiency aspects exist, is there awareness of how these correlate/inter-relate? How is the set of results reviewed and adapted when Strategic/Operational changes occur?
Usable Data	Results are timely, reliable, accurate and appropriately segmented to provide meaningful insights that support performance improvement and transformation.	<ul style="list-style-type: none"> The speed, consistency, completeness or any other quality aspects of the data and information used as source are appropriate for the organisation. Data, including predictive measures, is gathered and turned into information and insights to aid decision making and drive performance improvement and transformation. What is the reason for a specific segmentation when analysing performance/achievements?
PERFORMANCE		
Trends	Positive trends or sustained outstanding performance over the strategic period/cycle.	<ul style="list-style-type: none"> What is the clock speed of the sector/operating environment the organisation is active in? What the trend evolution over time demonstrates - is the performance improving, stabilising or degrading in line with the strategic objectives and operational targets? A specific trend is stronger, comparable or weaker than other relevant trends in the sector - how steep or fast?
Targets	Relevant targets are set in line with the Strategy and are consistently achieved.	<ul style="list-style-type: none"> For a selected key result a desired level to be achieved exists, is aligned with the Strategy and is understood by relevant key stakeholders. When this desired future performance level for a key result is clear - what is or was the rationale behind agreeing to that specific level? How close in reality these desired levels of performance are achieved or surpassed, or not at all, and how this impacts adapting the targets for the future.
Comparisons	Relevant external comparisons suitable to position own performance in line with the strategic direction are made and are favourable.	<ul style="list-style-type: none"> If there is (starting with strategic direction results) an awareness of similar measures used by 'others', within or outside of the sector or organisation. To what extent the information to compare with is valid, can be trusted, is easy to use etc. to position their own performance. What does the comparison say about a specific measure? Is it a bit or much better, maybe even 'the best', or just in the same range, or a bit/a lot worse, and how it impacts target setting? Note: competitor and industry averages may be used, but for outstanding organisations, these will also show comparisons with best-in-class or world-class - they can show they 'are the benchmark', they perform at a level others would like to be at.
Future Focus	Based on current cause & effect relationships, analysis of data sets, performance patterns & predictive measures, the organisation understands the drivers for outstanding performance in the future.	<ul style="list-style-type: none"> What are the insights gained concerning cause-effect relationships? e.g. how the approach has made a significant difference, and which result would never have been achieved without one or more specific actions, projects, initiatives etc. For which results is there a high level of trust and strong ability to convince others that the gains achieved in performance will be sustained? What is the probability it will further improve or stabilise? What are the relevant predictive measures given the sector and operating environment of the organisation? How are predictive measures used to understand future performance? Comprehension of the KPI linkages and hierarchy e.g., the relationship of upstream and downstream indicators.

5 EFQM Scoring Analysis

This graph represents the first 12 months of assessed scores from the new EFQM Model.

Based on data extracted from the EFQM AssessBase (including organisations seeking recognition and achieving an overall score of 300 through to over 700), the graph below shows the average scoring profiles referenced against both the Criteria and Criterion parts, of the new EFQM Model.



As a general point, most users of the new EFQM Model during the first 12 months of its introduction into the market were already familiar with the previous version and so they were well prepared for their next assessment. This explains why the average scores are on the high side.

With this data set we believe that most organisations have scored in-line with their performance with previous assessments using the EFQM Model. We are comfortable suggesting, therefore, that there can be some consistent read-across from one model to another if users feel that this is helpful at the whole model level (score out of a 1000).

At the aggregate level, we can make a few observations about organisations that are performing well. These organisations, over the last 12 months, have exhibited:

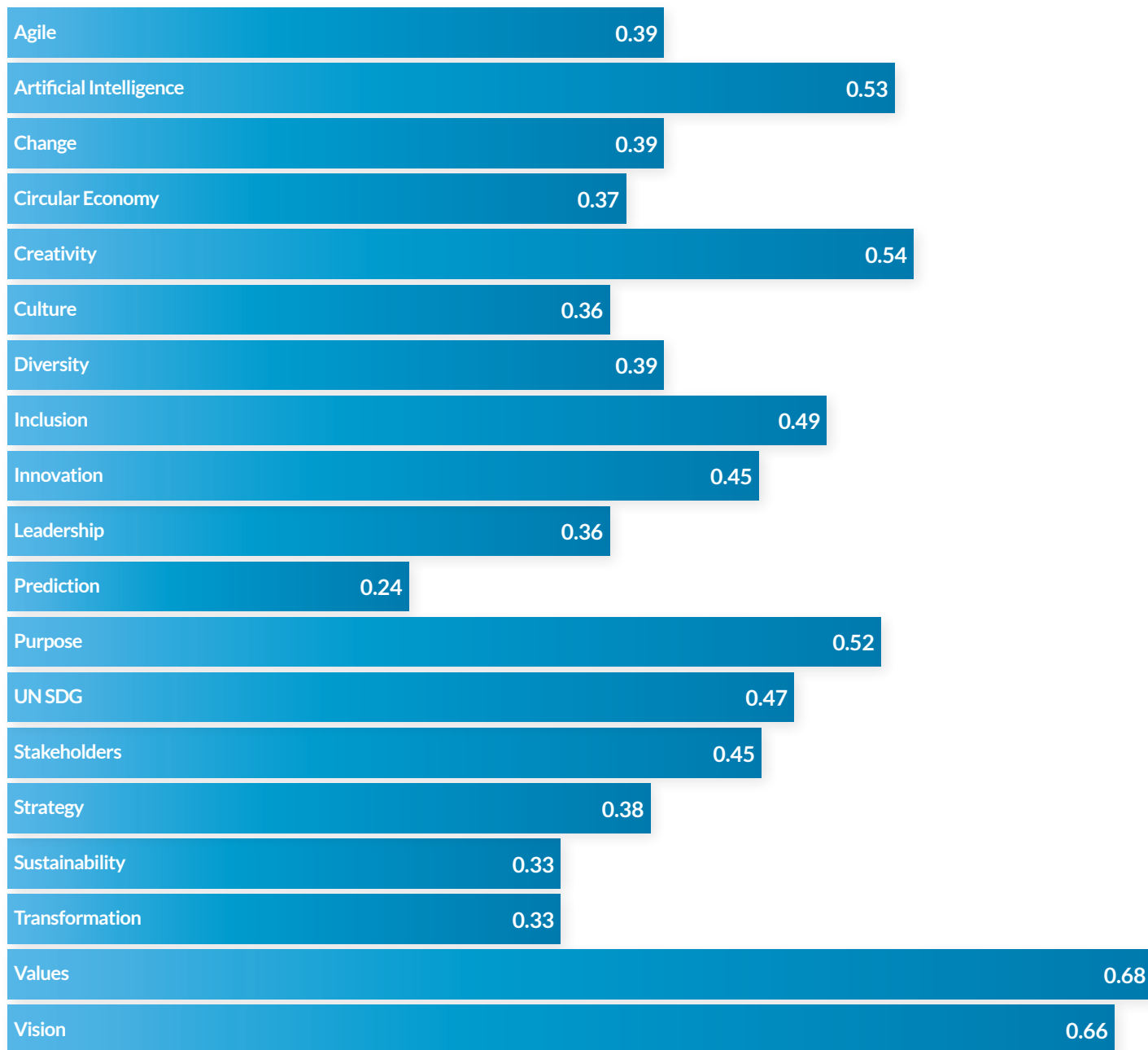
- Greater ability to manage, in parallel, large-scale change and day to day operations.
- A single clear purpose that everyone in their organisation understands and which runs through every aspect of the organisation's DNA.
- An ability to anticipate future change, be agile and adaptive with their people, processes and resources especially data and technology.

Looking at the data, organisations are doing well setting their Purpose and Strategy and Creating Sustainable Value to a broad range of stakeholders. Improvement is still required balancing daily priorities with disruption, change and transformation. There are possibilities for improvement by re-shaping the organisation for the future with better use of data and digital technology.

The lowest scoring areas are Stakeholder Perception results. And this is a key opportunity for those organisations that want to make a significant shift in performance. Our hypothesis is that organisations may indeed not meet the requirements of their Key Stakeholders, but it is more likely that expectations have not been managed well, and the results data and the way it is collected and measured needs improvement. For example, there is almost no usage of real-time perception data from Key Partners and Suppliers and no evidence that sentiment analysis is being collected and analysed. In addition, there appears less investment and focus on how to turn those wider stakeholders into advocates when compared with People and Customers.

EFQM is always happy to supply detailed breakdowns of assessment scoring by Criteria, size of company or sector, and we can only do this with the support of our partners who undertake assessments using the EFQM Model across the world, so we are indebted to them and thank them for their highly-valued cooperation.

6 EFQM Sentiment Analysis



This analysis is based on the assessments completed in English, using the Business Matrix Advanced tool, on the EFQM AssessBase.

Sentiment analysis is the use of language analysis to systematically identify, extract, quantify, and study affective states and subjective information. It uses an algorithm that determines the emotion behind the words of a sentence. A combined score is given to a text, based on how positive, negative or neutral the individual words used are, when set within the given context.

A score of +1.0 would be a comment full of strong, positive sentiment and effusive support. Alternatively, a score of -1.0 would carry very strong negative emotion. The value of this analysis is that it captures the nuance, and tries to provide the reader with more insight on what the writer is saying set against a comparable score.

EFQM uses a sentiment analysis engine that gives us great insight into our organisation, such as collecting feedback from our training delegates. We analyse their text response rather than use a simple 1-5 scale. It provides us with a richer insight into what people are “feeling” about their training experience.

In addition, using our sentiment analysis engine, we have analysed every 2021 EFQM Global Award (EGA) Submission to identify what words really evoke strong positive sentiment from the organisation as they write about themselves. It was rewarding to see such positive feelings expressed when organisations talked about Values, Vision, Purpose and Creativity. We hope these insights provide leaders of all organisations with a signal of what motivates people to join and to stay.

7 AssessBase

Continuous Organisational Insight

AssessBase is a flexible and bespoke tool to help organisations improve and manage change. AssessBase helps organisations measure, track and improve performance in the areas they are most interested in.

From start-ups looking to engineer fast growth through to successful businesses dealing with a crisis, or multinationals keen to adopt a sustainability culture, AssessBase can help.

AssessBase provides three levels of proven diagnostic tools suitable for organisations of any size and maturity. They can be used individually or combined for a more holistic view. Organisations can track progress and shift resources to better reach their goals by scoring their performance over time.

The AssessBase diagnostic tools address themes such as Purpose, Organisational Culture & Leadership, Stakeholder Engagement and Satisfaction, Creating Sustainable Value and Strategic & Operational Performance.

Questionnaire

A “light touch” assessment, using a simple questionnaire, to help “curious/less mature” organisations identify their current position and determine potential improvement opportunities.

Business Matrix

A more rigorous assessment referenced against all Criteria of the EFQM Model and provides a score on the RADAR elements. Using this tool, organisations can generate a more detailed understanding of their performance.

Business Matrix Advanced

A complete assessment against all Criterion-parts of the EFQM Model, the associated Guidance Points and score on the full RADAR Attributes. Using this tool, organisations can generate a detailed baseline on their performance and identify where they currently excel and where there are opportunities for improvement.



The EFQM Lens Series

Using the same guiding principles and seven Criteria of the EFQM Model, the AssessBase also features several 'Lenses' that can be used as diagnostic tools - tailored to measure and improve performance by focusing on a specific topic, such as the United Nations Sustainable Development Goals (UN SDGs), Circular Economy, or a specific sector, for example, Education.

Outstanding organisations find it important to integrate and embed specific management topics or ensure good sector practices within their Purpose, Ecosystem, Leadership, Culture, Operations, and Results.



By Topic

Circular Economy

Provides a method for organisations to measure and improve the way they migrate from their current 'take, make, dispose' way of working to a series of more regenerative approaches.

UN Sustainable Development Goals

Provides a method for organisations to measure their progress towards embedding the relevant UN SDGs and associated targets into their way of working.

Innovation

It shows how organisations can create a stronger innovation culture and drive results.

Disruption

Guides organisations as they identify how well prepared they are for disruption and major change and how effective leadership is managing today in times of disruption.

By Sector

Education

Help school leadership teams to measure current performance and shape future activities to improve it.

WHERE CAN I FIND OUT MORE?

- To arrange a live demo of AssessBase or if you have any questions, please email us at assessbase@efqm.org
- You can also access the AssessBase questionnaire for free at efqm.org/assessbase
- You can buy a licence for AssessBase, which gives you full access to our online shop. efqm.org/assessbase/shop

Agile: The organisation's ability to change direction/focus in response to an emerging opportunity or threat in a timely way.

Approach: The overall way by which something is made to happen; an approach comprises processes and structured actions within a framework of principles and policies.

Benchmarking: A systematic comparison of approaches with other relevant organisations that gains insights that will help the organisation to take action to improve its performance.

Business Model: The elements of the business that create and deliver value; these elements normally include the value proposition, the customer segments and their associated relationships, the channels used to take products, services and solutions to market, the revenue & cost streams, partners, and the critical resources and processes of the organisation.

Circular Economy: A circular economy is a regenerative approach, in contrast to the traditional linear economy, which has a 'take, make, dispose' model of production. It is an economic system which can be achieved through long-lasting design, maintenance, repair, reuse, remanufacturing, refurbishing, and recycling http://ec.europa.eu/environment/circular-economy/index_en.htm

Community: The term community typically refers to the various individuals, groups and institutions that have a vested interest in the welfare and success of the organisation, its associated neighbourhoods and the impact that it may have on its ecosystem.

Comparisons: Data used to compare the performance of one organisation or process with another.

Competence: The ability or skill to do something efficiently and effectively.

Creativity: The ability to move away from current rules, methods and relationships to generate ideas for new or improved processes, products, services, solutions, systems or social interactions.

Culture: The specific collection of values and norms that are shared by people and groups within an organisation that influence, over time, the way they behave with each other and with Key Stakeholders outside the organisation.

Customer: The recipient of the products and/or services provided by the organisation. The Customer is one of the Key Stakeholders, in many cases the primary Key Stakeholder, for whom the organisation aspires to Create Sustainable Value.

Disruptive Thinking: Breaking free from the confines of routine thinking, getting a new, larger, different perspective, seeing things from another angle or in another light.

Diversity & Inclusion: The extent to which the people within the organisation recognise, appreciate and utilise, the characteristics that make individuals unique Diversity & Inclusion can relate to age, beliefs, class, ethnicity, physical abilities, race, religion & sexual orientation.

Ecosystem: A fundamental principle of an ecosystem is interdependence, i.e. something that happens in one part of the system may affect other parts within the system. In the context of an organisation there are many factors external to it that affect how it operates, but over which it has no control. These can include government policy, the economic and societal make-up within its region and neighbourhoods, the prevailing religious and cultural expectations of its communities, demands for sustainability and available financing.

Empowerment: The process by which individuals or teams are granted power, operate with a degree of autonomy in their actions, are able to take decision making responsibilities and have access to resources and control over their own lives. In doing so, they gain the ability to achieve their highest personal and collective aspirations and goals. When an individual is empowered, he/she has a greater sense of motivation and self-confidence.

Ethical Behaviour: Ethics are well founded standards in a Culture that make a person's actions right or wrong. They influence behaviour and help an individual to make the right choices and act responsibly.

Forecast: The ability to predict or calculate what will happen or be needed in the future as a result of the study and analysis of available, relevant data.

Gender Balance: Within the context of an organisation, it relates to women having the same opportunities as men to progress their careers, including increasing women's representation in decision-making bodies.

Global Compact: <https://www.unglobalcompact.org>

Good Practice/Best Practice: Superior approaches, policies, processes or methods that lead to exceptional achievement. Since it is difficult to find out what is best, the term “good practice” is preferred by most organisations. Ways to find good practice outside the organisation can include benchmarking and external learning.

Governance: A framework of authority and control within an organisation used to help it fulfil its legal, financial, ethical and general stewardship obligations.

Innovation: The practical translation of ideas into new or existing products, services, solutions, processes, systems, organisational structures or social interactions.

Integrity: Integrity is the quality of having a strong moral or ethical code. This includes values such as respect, fairness, trustworthiness and honesty.

Intellectual Property: The value of an organisation that is not captured in its traditional financial accounts. It represents the intangible assets of an organisation and is often the difference between market and book value.

Knowledge: The expertise and skills acquired by a person through experience and education, involving the theoretical and/or practical understanding of a subject. While data are raw facts and information is data with context and perspective, knowledge is information with guidance/ability for action.

Learning: The process of gaining skills, knowledge and understanding through study and experiences.

Learning Network: A group of people with a common goal or interest who pool their individual information, knowledge and experience to actively learn together.

Manage Change: An approach for leading the transition of individuals, teams and organisations from their current state to a defined, desired future state. It is an Organisational process aimed at helping those stakeholders affected by the change to understand, accept and embrace it.

Megatrends: Topics that are expected/predicted to be global influences in the coming years. These are the topics that, regardless of size, reach or Private/Public sector status, an organisation should heed if it is to remain relevant.

Partner: An external party with whom the organisation strategically chooses to work with to achieve common objectives and provide long term mutual benefit.

Partnership: A durable working relationship between the organisation and one or more partners that creates and shares greater value for both parties. Partnerships can be formed with, for example, suppliers, distributors, customers, educational establishments, consultancies or research organisations.

People: All individuals employed by the organisation (full time, part-time, including volunteers), including leaders at all levels
Perception: Whatever a Key Stakeholder may think or feel about the organisation, his or her opinion may be different to what they say about the organisation for any number of reasons. How the Key Stakeholder expresses his or her view can be achieved in any number of ways but, regardless, the reality is that the Key Stakeholder has a perception and the organisation needs to first understand and then manage this perception if it is to continue to meet its Key Stakeholder needs.

Process: A set of activities, repeated over time, that interact with one another as the output from one activity becomes the input for another activity. Processes add value for external or internal customers by transforming inputs into outputs, using resources. Typically, there are three types of processes: main or ‘core’ processes, management processes and support processes.

Prosumer: A way of segmenting an organisation’s customers beyond the more traditional definitions. The digital and online world of the 21st century offers significant potential for an organisation to engage its customers in designing the products, services or solutions they wish to consume.

Purpose Statement: A statement that describes the *raison-d’être* of an organisation i.e., what it does and why it does it and which is understood by its stakeholders.

Sell the Value: Regardless of whether the organisation is private or public sector, its value proposition, its offering still has to be ‘sold’ to Key Stakeholders so that they will decide to take the product, service or solution on offer.

Society: The social infrastructure outside the organisation that can be affected by, or, equally, can impact on the organisation. This can be representatives of the immediate Community or the Wider Society, including, for example, Special Interest Groups.

Strategy: Derived from a careful analysis of its ecosystem, the way an organisation intends to achieve, over a particular time period, its strategic priorities, moving from where it is now to where it wants to be in the future whilst remaining true to its Purpose.

Sustainability: The long term future of the organisation, as perceived by its various Key Stakeholders, i.e. the Business & Governing Stakeholders, its People, its Community, its Partners & Suppliers.

Third Sector Organisation: An organisations that is neither public sector nor private sector. Typically, it can be a voluntary or community organisation, a registered charity, self-help or community group. Generally, the organisation is independent of government and motivated by the desire to achieve social goals. It needs to make a surplus (profit) on its actions to be financially sustainable and any profit made from its actions is reinvested in the pursuit of the organisation's ambitions.

Transparency: The situation in which collaboration, cooperation and collective decision making happens in an open manner and people can trust that business is being conducted fairly and honestly.

United Nations Sustainable Development Goals:

<https://www.un.org/sustainabledevelopment/sustainable-development-goals/>

Value Proposition: The differentiating value that the organisation's products, services and solutions offer to customers.

Values: Operating philosophies or principles that guide an organisation's internal conduct as well as its relationship with the external world. Values provide guidance for people on what is good or desirable and what is not. They exert major influence on the behaviour of individuals and teams and serve as broad guidelines in all situations.

Vision: Description of what the organisation is attempting to achieve in the long term. It is intended to serve as a clear guide for choosing current and future courses of action and, along with the organisation's Purpose, it is the basis for strategies and policies.

9 Acknowledgements

9.1 Introduction

Nearly 2,000 individuals contributed to the review of the previous version of the EFQM Model, a process that started in June 2018 and culminated in the launch of the next generation of the EFQM Model at the EFQM Forum in Helsinki (23rd-24th October 2019).

EFQM wishes to acknowledge the support it has received from, and offer sincere thanks to, the following individuals and organisations. Without them, it would not have been possible to produce what EFQM believes to be a World-Class Model that any organisation can use, to help it achieve outstanding levels of performance.

9.2 EFQM Core Team

First and foremost, on the roll call of recognition for the delivery of this most recent version of the EFQM Model is the Core Team, created by EFQM to help it drive the development process. EFQM wishes to acknowledge the efforts that each and every member of the Core Team made over the duration of this project. Their professional attitude and approach to the challenge they were presented with was exemplary, and their efforts and commitment to help the Foundation produce the best possible next-generation EFQM Model is highly appreciated.

Dr. Andreas SCHMIDT: SSB Consult: Germany
Carola MENZER: T-Systems Multi Media Solutions: Germany
Diane DIBLEY: British Quality Foundation: UK
Ehrtfried BAEUMEL:
Robert Bosch GmbH, Plant Bamberg: Germany
Gail TUTCHER: British Quality Foundation: UK
Professor Hadi El TIGANI:
Dubai Electricity & Water Authority: UAE
Hakan KILITÇIOĞLU: ARGE Consulting: Turkey
Ignacio BABÉ: CLUB EXCELENCIA EN GESTIÓN: Spain
Johann SAUERMAN: Quality Austria: Austria
Matt BYROM: Siemens: UK
Peter BROWNING: Signify: The Netherlands
Rebecca KELLY: West Lothian Council: Scotland
Sabine KERN: Vamed: Austria
Stéphane VERDOUX: Strateis: France
Susana FÁBREGAS: CLUB EXCELENCIA EN GESTIÓN: Spain
Dr. Thomas BÄUERLE: SSB Consult: Germany
Professor Vittorio CESAROTTI:
University of Rome Tor Vergata: Italy

9.3 Survey Respondents

Responding to 86 questions in a survey is more than a 5-minute task and receiving 1200+ responses was a strong indicator to EFQM of the level of interest in the EFQM Model renewal initiative. The survey responses provided by this second group were instrumental in enabling the Core Team to make a flying start.

9.4 EFQM Vienna Forum Workshop Participants

The third group to whom EFQM wishes to extend its thanks are the 60+ people who participated in a workshop on Day 2 of the EFQM Forum 2018 in Vienna to listen to the initial thoughts of the Core Team and respond to some challenging comments that had been identified in the survey responses.

9.5 C-Suite Interviewees

The fourth group that EFQM wishes to acknowledge, and offer thanks to, are the C-Suite individuals who agreed to be interviewed by Core Team members, responding to the question “As a C-Suite Executive: What keeps you awake at night?” Not all interviewees wished to be recognised by name in any subsequent EFQM articles or publications, so we have restricted ourselves to listing the different industry sectors that engaged in this step in the process:

- Automotive
- Aviation
- Circular Economy
- Confectionary, Food & Beverage
- Consulting
- E-commerce
- Education
- Electronics & Semiconductors: Technology: Information, Communications, Technology (ICT)
- Energy
- Financial Services
- Healthcare: Public & Private
- Industrial Automation
- Manufacturing
- Not for Profit
- Online Business
- Pharmaceuticals
- Public Sector
- Steel
- Trade Union
- Transport

9 Acknowledgements

9.6 Co-Development Testing Organisations

The fifth group worthy of mention is the 24 organisations that volunteered to enter into the Co-Development testing phase. The feedback from these organisations proved invaluable in helping the Core Team crystallise its thinking in terms of what final adjustments were necessary to ensure the EFQM Model would be fit for the future. Our sincere thanks go to the following organisations who undertook the testing in their European operations:

- Bosch Rexroth S.p.A: Italy
- CLUB EXCELENCIA EN GESTIÓN: Spain
- Enagas: Spain
- ESBAS: Turkey
- Geriatric Health Centres of the City of Graz (GGZ): Austria
- Helsana Versicherungen AG: Switzerland
- Robert Bosch GmbH, Plant Bamberg: Germany
- Robert Bosch GmbH, Plant Blaichach: Germany
- Robert Bosch Car Multimedia GmbH: Germany
- Siemens: Digital Factory: UK
- Signify: The Netherlands
- TetraPak: Italy
- UNOPS: Denmark
- Vamed: Austria
- West Lothian Council: Scotland
- Wheatley Group: Scotland
- Wiener Konzerthaus: Austria

Thanks are due also to the following organisations from the United Arab Emirates (UAE), who participated in the Co-Development testing of the Model and provided equally valuable feedback.

- Abu Dhabi Police
- Dubai Airport Free Zone Authority
- Dubai Electricity & Water Authority
- Dubai Municipality
- Dubai Police
- Knowledge & Human Development Authority (KHDA)

Special thanks are extended to Isra'a MOBIDEEN, from the EFQM Office in the UAE, who supported these six organisations in the testing process.

EFQM's thanks also go to the BMW Mexico Operations Department team based in the San Luis Potosi factory in Mexico, supported by Hans-Joachim SCHNEIDER of QMS GmbH.

A special mention should also be given to the members of the French Benchmarking Club who held two separate ½ day workshops in Lyon & Toulouse to critique the draft version that was placed before them.

9.7 Translators

The working language of EFQM is English, but its Model is used in many countries around the world where English is not the first language. Benefitting from this significant global coverage is made possible due to the support EFQM receives from a cohort of translators, many of whom work for our Certified Recognition Organisations. We thank them most sincerely for their efforts in helping us to make this latest version available in so many different languages.

9.8 EFQM Office

And last, but by no means least, the following members of the EFQM Office team who were fully involved in the development process and whose support and engagement were essential ingredients to the success of the project.

Geoff CARTER: Model Development Core Team Leader & Product Advisor

Gianluca MULÉ: Chief Operating Officer

Samuli PRUIKKONEN: Senior Manager – Assessment & Recognition

Vinciane BEAUDUIN: Global Head of Digital Services

My sincere thanks to everyone mentioned above for your time, your thoughts and your interest in helping EFQM with its own transformation as well as the transformation of its globally recognised, leading-edge Model.

Russell LONGMUIR
Chief Executive Officer
EFQM

Involvement & Engagement

Becoming an EFQM Member is the opportunity for you to join a network that connects organisations globally, regardless of size and sector, and provides the opportunity to share, learn and converse with peers. As an EFQM Member, you are provided with professional support in designing & executing your road map for performance improvement, gaining insights as you progress. You will have access to a range of exclusive benefits that will support the organisation to overcome any challenges, manage change and Create Sustainable Value for your Key Stakeholders.

Join the Community on TOTEM, the EFQM Engagement Tool. This is the place where you can share interesting articles, ask questions, post photos of your team(s) activities, at work, where they have been, what they are doing and have fun.

Access to Further Resources

The EFQM KnowledgeBase is a repository of curated and validated content on a variety of topics, sectors, and material. You will be able to surf through success stories, insights, articles, videos, podcasts, tools or data analytics to support your organisation's improvement journey or your own personal development. efqm.org/knowledgebase

Training

EFQM's training portfolio offers courses that support and help develop your ambitions to become skilled in the application of the EFQM Model. Starting with a Foundation Course that provides a basic understanding of the EFQM Model, you can then follow three, interchangeable paths according to your own needs:

- The Assessor Path, for those who want to become a qualified EFQM Assessor and take part in an external or internal assessment.
- The Organisational Change Leader course is for those who want to lead change with confidence by using the EFQM Model to help manage and land the desired change.
- The Lens Path where the focus is on using the Model to examine a specific management topic such as Innovation, including how to use the Model in diagnostic mode to assess your organisation's strengths and opportunities for improvement in the chosen topic.

Recognition

EFQM Recognition is a great way to demonstrate that your organisation is committed to improving its performance and being fit for the future. The different levels of recognition provide milestones on the journey, helping to motivate an organisation's people and sustain momentum.

The EFQM Global Excellence Award is the ultimate competition for recognising outstanding organisations globally. If your organisation enters into this competition, it is "playing in the Champions League," subjecting itself to a very rigorous assessment process conducted by a team of experienced EFQM Assessors who, collectively, have experience in different sectors and come from different cultural backgrounds.

EFQM Assessments, regardless of whether it is for an external or internal assessment, are supported by an online platform, the EFQM Assess Base. This is an intuitive platform to support your organisation as it goes through the assessment process. From a beginner to a more mature level, you will find the tool that will help you and your team to identify your strengths and opportunities for improvement. Thematic tools (Lens) on management topics such as innovation or the circular economy, are also available on this platform, enabling your organisation to gain specific information on both its process and performance in these important areas. efqm.org/assessbase

EFQM: What We Do

TRAINING

Manage, innovate, change.

Learn to manage transformation and change using the EFQM Model

Whether you're exploring the EFQM Model for the very first time, want to position yourself as an expert, or intend to use the EFQM Model to improve your organisation, we can help you to achieve your goal.

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INSIGHT

Benchmark, improve then dig a little deeper...

Always improving, always learning

AssessBase is a flexible and bespoke tool to help organisations improve and manage change. KnowledgeBase is a knowledge and resource hub to support organisations and individuals by providing direct access to comprehensive and curated content.

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The EFQM Community likes to recognise and reward success

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Contact EFQM if you want to improve the way you work and help your organisation grow.

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