

# The Organizational Excellence Framework

*A total quality improvement program guaranteed to increase productivity and innovation*



**PATERSON**  
CONSULTING

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& ASSOCIATES



*Helping Individuals & Organizations Become Healthy, Wealthy, and Wise Through Intelligent Transformation!*

The Organization Excellence Framework, published in 2010, helps organizations – business, governmental and not for profit - move towards total quality values, practices, and measures based on leading principles common to high performing organizations. It is a powerful diagnostic tool, which identifies where an organization stands in relation to the key dimensions of managing an organization against internationally identified standards of excellence. As a result, the application of the Framework identifies where improvements can be made, and qualified Organizational Excellence Specialists can use its assessment to help craft individualized action plans for each client, based on the priorities of each organization.

### **Organizational Excellence Framework (OEF) – General Overview**

The OEF integrates the best of the excellence framework approaches contained in the leading quality management systems and awards programs in the world, including:

- Canadian Framework for Excellence ([www.excellence.ca](http://www.excellence.ca))
- Malcolm Baldrige Excellence Program (US), ([www.nist.gov/baldrige](http://www.nist.gov/baldrige))
- European Foundation for Quality Management ([www.efqm.org](http://www.efqm.org))
- Australian Business Excellence Framework ([www.businessexcellenceaustralia.org.au.abef](http://www.businessexcellenceaustralia.org.au.abef))

Since these national jurisdictions developed award programs to recognize excellence in the late 1980s and 1990s, close to 100 countries have followed suit. Ongoing global research with excellence award recipients has validated the positive relationship between implementing an excellence, or quality management framework, and resultant organizational performance.

Appendix 1 provides a listing of the principles and best management practices of the OEF, shows the overlap with the ISO 9001 standard and leading global frameworks, and highlights applicability to micro and small-medium-large size enterprises.



## Benefits of Applying the Framework

The Organizational Excellence Framework is a platform for **long-term organizational success** that is applicable to **any size and type of organization**. Organizations that implement the OEF will see a significant return on investment as it realizes the following benefits through implementation. The OEF:

- Provides the *foundation* on which to develop an organization;
- Provides an *integrated and coordinated way* to drive tangible results;
- Identifies the *interdependencies and interrelationships* between functional *management areas*;
- *Reduces non-value adding activity*;
- Contributes to becoming an *'employer of choice'*
- Provides a *performance benchmarking* program.

## Automated Assessment

The Organizational Excellence Framework has been digitized on an automated diagnostic platform. This allows practitioners to engage the client through automated self-assessment and generate an action-oriented report that identifies strengths and opportunities for improvement.

The report, which is generated confidentially by staff at Organizational Excellence Specialists, can be further augmented to focus on the challenges and priorities of each client. In addition, the platform is used in global research to collect data from other organizations and provide a Global OE Index that can be used to compare current state with others by size, industry sector and region. This platform can be used by participating consultants to do annual assessments with clients and provide benchmark comparisons with others.

## How to Access the OEF – Working with an Organizational Excellence Specialist

The OEF has been developed into an application toolkit which follows the stages in the professional management consulting process. It can be used as an introductory diagnostic, working with client groups through workshops and applying the framework and entering the results into the automated assessment system.

From there, the results of the assessment can be tailored into relevant Action Plans for appropriate improvements in the client organization. This can then be followed by assistance in implementing the recommended changes, as desired by the client organization.

The implementation of best management practices can unfold over several stages and multiple years to develop a culture committed to excellence and build capacity of employees.

Organizations that wish to work with a qualified Organizational Excellence Specialist can achieve huge gains in efficiency and effectiveness in their management system and work processes along with methods to effect continuous improvement. The result is increased productivity, innovation and client satisfaction for any organization - whether business, government or not for profit.



## SCHWENKER & ASSOCIATES

**Kevin Schwenker**  
**Principal, Schwenker & Associates, Halifax, Canada**  
**Registered Organization Excellence Specialist (ROES)**  
**CMC-Academic Fellow (CMC-AF)**  
**Fellow Certified Management Consultant (FCMC)**

Kevin Schwenker, FCMC, ROES, CMC-AF, has been an independent management consultant, influencing, and facilitating learning in his clients for over thirty-five years. While only recently joining ENS and their negotiation training practice, he has specialized in assisting organizations succeed with strategic planning and change implementation, assessing progress towards and implementing organizational excellence initiatives, managing projects, and creating engaged employees through performance management and talent development. Kevin has a long history of coaching and training, including the development of powerful, strategic, and effective mentoring programs. He has been a consultant to consultants, making significant contributions to the international management consulting industry, while also leading a wide range of multi-faceted consulting projects locally, nationally, and internationally, for private, public, and not-for-profit sector clients.

He became a Certified Management Consultant in 1991 and was recognized in 1999 with the distinction of Fellow (FCMC). He was also honoured with the CMC-Canada Golden Jubilee Award (2013) as one of the key builders of the Canadian management consulting profession during its first 50 years. Kevin led the team which wrote the Common Body of Knowledge for the Canadian Association of Management consultants, "Management Consulting: An Introduction to the Methodologies, Tools, and Techniques of the Profession" which was published 2009. He is currently working with another colleague to update and edit a second edition for publication in 2025.

Kevin was certified as a Registered Organizational Excellence Specialist (ROES) in 2015, and began immediately working in the field, undertaking detailed assessments, and helping organizations improve productivity, innovation, and growth. The excellence journey involves the study, benchmarking and reengineering of organizational business models, culture, systems, and processes. Since 2016, he has been part of a group of international subject matter experts undertaking comprehensive excellence assessments of government departments and leaders in the United Arab Emirates, Dubai, and Abu Dhabi Excellence Programs. He has also been an International Assessor with the Global Performance Excellence Award.

Kevin was invited to join the faculty at the Sobey School of Business, Saint Mary's University (Halifax, Canada) as an industry expert and has been teaching advanced practical MBA courses since 2001. He was awarded the distinction of Adjunct Professor in September 2018. In 2022 the International Council of Management Consulting Institutes awarded Kevin with an Academic Fellowship (CMC-AF) in recognition of his outstanding contribution in building the linkages between academia and the profession of management consulting.



**Wesley Paterson**  
**Award-Winning Management Consultant | Trusted**  
**Advisor to C-Suite | Driving Strategic Growth,**  
**Innovation & Organizational Excellence**

Wesley Paterson, CMC®, is known for his expertise as both a 'practical' & 'insightful' award-winning consultant, coach and trusted advisor. He creates dramatic improvement in performance and productivity for the clients he



serves. Individuals & organizations report seeing positive change & improvement immediately upon beginning an engagement with Wes. His results-based focus, and pragmatic nature, results in organizations increasing their sales & profits, maximizing their ROI, and establishing clear pathways that optimize high performance and strategic execution at all levels.

Wes works with companies & organizations ranging from small and medium size family-owned operations, to Fortune 500 & Global 500 companies, to government at the municipal, provincial, and national level. His methodologies deployed produce practical, tangible results for the clients he serves, moving them from where they are, to where they want to be and beyond. Wes is also trained in ISO 20700 through CMC-Global.

Whether working with individuals, teams, or entire organizations, Wes focuses on maximizing results and ongoing 'wins'. Management consulting, organizational wellness, executive coaching, leadership development, personal & career development, performance consultation, and improving communication effectiveness are areas where Wes truly stands and delivers. Clients truly recognize the value in his delivery and engagement by the results and changes they witness in their people, performance, and productivity.

Wesley Paterson has garnered significant acclaim at provincial, national, and international levels through an impressive array of awards. He was bestowed the Queen Elizabeth II Platinum Jubilee Medal (Alberta) in recognition of his outstanding service and contributions to his community. His professional expertise in management consulting earned him the ICMCA Emerging Professional of the Year 2024, an honour celebrating new CMCs who exemplify exceptional ethics and elevate consulting standards early in their careers. Wesley's accomplishments reached new heights as he was named the National Champion of Canada 2024, showcasing Canadian excellence in management consulting on the global stage. Most recently, he, along with Paterson Consulting Inc., received the CMC Canada Project of the Year 2025 - Silver Award for their outstanding project work. His global reputation was further solidified with a nomination for the prestigious ICMCI Constantinus International Award 2024, which honours groundbreaking projects in management consulting and places him among the industry's elite worldwide.

Wesley Paterson is the trusted advisor for the AI Age, combining decades of human-centered consulting wisdom with cutting-edge AI capabilities. While others choose between high-tech efficiency or high-touch service, Wesley delivers both – using advanced AI tools to enhance deep human insight and trusted advisory relationships.



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