

Implementing the Organizational Excellence Framework *Three Steps*



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

Implementing the Organizational Excellence Framework with nationally and internationally recognized Certified Management Consultants and Registered Organizational Excellence Specialists.

The Organization Excellence Framework© helps companies move towards total quality values, practices, and measures based on leading principles common to high performing organizations. It is a powerful diagnostic tool, that identifies where an organization stands in relation to the key dimensions of managing an organization against internationally identified standards of excellence.

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

Since these national jurisdictions developed award programs to recognize excellence in the late 1980s, and 1990s, over 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.



The OEF takes excellence a step further. Beyond just evaluating where your organization sits now, it fills a gap in the existing literature and models through enhanced implementation guidelines. For example, how do you:

- Ensure you have a good governance system?
- Prepare a strategic plan or a business plan?
- Determine true customer needs and expectations?
- Undertake human resource planning that supports organizational goals and objectives?
- Document the way work is done?
- Develop win-win arrangements with suppliers and partners?
- Define resource requirements?
- Develop a balanced system of measurement?

Simply put, it provides insights into the most frequently asked questions by clients, “How do you do these things?”, while at the same time leaving lots of room for our registered specialists to work with their clients, and bring their expertise to bear through facilitating, training, and assisting in implementation. It is an incredibly robust tool which is just as applicable to small-medium sized organizations and not for profits, as it is to large enterprises and governments.

Implementing the Organizational Excellence Framework

We use a very practical and cost-effective implementation process that:

- Engages management and staff
- Shares the workload throughout the organization
- Encourages employees to share suggestions and ideas
- Encourages the organization to participate in benchmarking and to learn from others

Implementing the OEF with an ROES

*Easy as
1, 2, 3...*

ASSESSMENT:

- Training
- 9 Principles
- 9 Key Management Areas
- 95 Best Management Practices

IMPROVEMENT PLAN:

- Report
- Analysis
- Recommendations
- Training/Facilitation

IMPLEMENTATION

- Facilitate the launch
- Follow-on Assistance through:

Training • Consulting • Change Management • Coaching • Canada-Wide and International Team to draw on

1 ASSESSMENT

- Generally, we start with a training session so that everyone in the organization learns about excellence models
- Then we work with management and staff to self-assess the organization against the OEF. During this exercise everyone has a chance to discuss the organization's strengths and opportunities for improvement

2 IMPROVEMENT PLAN

- Next, we prepare a report based on our analysis of the assessment results and make recommendations for improvements
- We will then facilitate the development of an improvement plan, made of up of action plans to address any low rated practices

3 IMPLEMENTATION PROCESS - What We've Learned

- These action plans then move forward into implementation – which is generally delegated to the employees who have self-identified. We recommend you start with a town hall to present the plan and engage in other workforce productivity, project management, and change management initiatives (which we help through training the those key employees that will be leading and executing the excellence journey)
- We provide follow on assistance through training participants in specific key management areas where internal expertise may be lacking or needs support, helping with strategic & business planning, and providing additional recommendations in specific next steps required (training & development, process optimization, digital transformation, project management, change management, coaching & consultation)
- We also have a national and international team of Organizational Excellence Specialists and Certified Management Consultants with specific expertises to match your needs.

IMPLEMENTATION PROCESS - 5 THINGS WE'VE LEARNED



*Engage & involve
all the employees*



*95% of
improvement
ideas will come
from employees*



*5% of
improvement
ideas will come
from outside*



*It is important to
have fun &
celebrate
accomplishments*



*Most
organizations
continue to strive
for improvement*

Implementation – Organizational Excellence Delivers Results

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 and accrue several benefits.

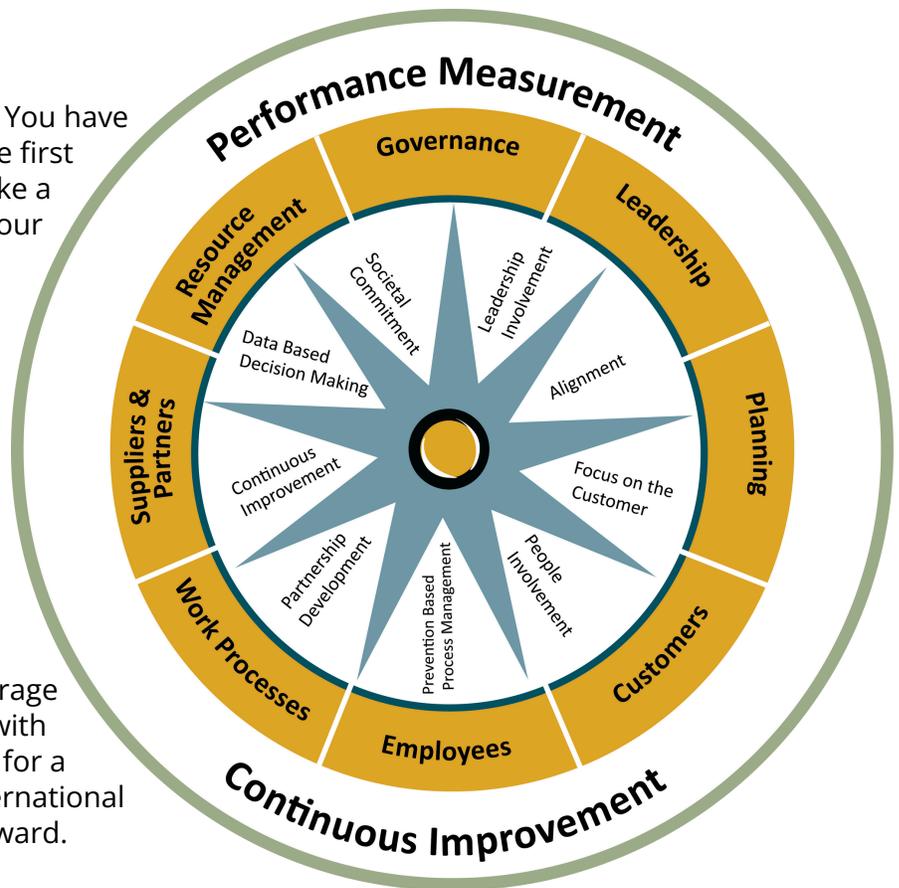
The OEF:

- 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; and
- Provides employees the opportunity to become engaged.
- Contributes to becoming an 'employer of choice'; and
- Provides a performance benchmarking program.

Measuring Progress

We like to follow up on progress. You have your original benchmark from the first assessment. It is easy to undertake a follow-up assessment to gauge your progress. However, international benchmarking comparisons are also becoming available. OES is Representing Canada on both the Global Benchmarking Network and the Organizational Excellence Technical Committee(QMD, ASQ).

And when an organization is close to completing implementation of their quality excellence action plan, we encourage them to share their experience with other organizations and to apply for a national excellence award or international best practice or benchmarking award.



*The Organizational Excellence Framework
(©Dawn Ringrose, 2010)*



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.



PATERSON
CONSULTING

Contact for more information:

Wes Paterson, CMC



403-928-9606



wes@patersonconsulting.ca