SAQI
The South African Quality Institute

e - Quality Edge

bringing quality information to South Africans since 1996

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Welcome to our September edition

We have another full edition for you this month and we will focus on both the current ISO 9001 requirements standard and how these requirements are viewed in the market place and will its successor be any different?

I will kick off by lodging my own concerns about moving away from a focus of "Continual Improvement" found in the current ISO 9001:2008 to just "Improvement" found in the ISO 9001: DIS 2014 but yet still recommending the use of the PDCA cycle. I will ask the question; are PDCA and Continual improvement mutually inclusive?

We also have an article in this month's edition from the USA on auditing processes based on process risk that also questions the correct use of a process approach. We have a similar article from our Zambian neighbours on understanding a "systems thinking" approach and why many QMSs based on the ISO 9001 requirements fail to deliver customer satisfaction.

In response to last month's article by Bill Coetzee on World Class Manufacturing pitfalls, one of SAQI's training facilitators Jacques Snyders has put together a support feature entitled "Don't kill Bill"

We also include our other regular contributors in this month's edition.

As ever, I would be happy to receive comments relating to our articles or any other items of interest relating to quality at exec@saqi.co.za

Yours in Quality

Paul Harding
SAQI MD

Quality:
helping South Africans live, learn and work better

Are PDCA and Continual Improvement mutually inclusive?

by Paul Harding, *SAQI MD*

SAQI was recently asked to comment on the ISO 9001:2014 DIS at a working group meeting of SABS TC 176 in Pretoria. There were many comments received, some of them editorial in nature, most of them questioned the use of certain vocabulary and definitions and the relationship between ISO 9001 and ISO 9000.

I submitted only two comments. The first was; can we drop the title of Continual Improvement as a heading of one of the clauses of the current ISO 9001 DIS and yet still retain the PDCA cycle as the foundation of the requirements standard? The second comment was on a lack of consistency between the proposed ISO 45001 Health and Safety standard and the ISO 9001 Quality standard.

So let's get back to the first comment. The PDCA cycle, figure 1 shown in the DIS referred to the Act part of the Cycle as clause heading "10 Continual Improvement", whereas clause 10 in the DIS only referred to "Improvement". However, this was generally acknowledged by the meeting as a "finger" error as it should have said "Improvement" to match the clause heading found in clause 10. (Pity we don't have quality in a quality standard) So the solution is easy said the meeting, let's not rock the boat and just change "Continual Improvement" in the model to "Improvement" and the problem is solved. It was also mentioned that there was a sub clause 10.3 that does give the "option" of continual improvement if you want it.

Now this is the point I want to make. The explanation of the Act part of the PDCA cycle in the ISO 9001:2014 DIS says "Take action to improve process performance as necessary" Is this definition compatible with the generally understood interpretation of PDCA or not?

Now I come to my second comment. In the CD of ISO 45001 the explanation of the Act part of the PDCA cycle says "Take action to "continually improve" Now where is the consistency of the so-called "High level text" where we have to continually improve in Health and Safety but only "as necessary" in Quality? Of course the answer to this question was also easy. "Don't worry; we are sure that once the authors of the ISO 45001 CD "realize their mistake" they will change it to "as necessary". Although I am a great believer in continual improvement, particularly when it comes to customer focus, I could, however, reluctantly accept that if the ISO community want to lower the effectiveness of ISO 9001 the lesser option of "improvement as and when necessary" could be an option. So then they must drop the reference to PDCA as I feel that the two are *mutually inclusive*.

What does the rest of the world think?

Do the ISO community have the right to change the conceptual meaning of PDCA?

If you Google PDCA you will immediately receive 1,310,000 references. Of course you will have to ignore references such as the Parramatta District Cricket Association based in Australia but the vast majority will be referencing Plan, Do, Check Act.

The American Society for Quality says that among the most widely used tools for **continuous improvement** is a four-step quality model—the plan-do-check-act (PDCA) cycle, also known as Deming Cycle or Shewhart Cycle:

Plan: Identify an opportunity and plan for change.
Do: Implement the change on a small scale.
Check: Use data to analyze the results of the change and determine whether it made a difference.
Act: If the change was successful, implement it on a wider scale and continuously assess your results. If the change did not work, begin the cycle again.

The following extract links PDCA to ISO 9001:2008:

...continue on page 3

ISO 9001 PDCA cycle is not a singular thing. It is actually a series of imbedded PDCA cycles. Clause 7 is not just about doing. Product realization is itself an ISO 9001 PDCA cycle that starts with planning requirements and realization needs. Next comes development (doing), development reviews (checking), and finally development revisions (actions). This same PDCA cycle is occurring within training, documentation, purchasing, auditing, corrective action, etc. The whole concept of continuous improvement relies on PDCA.
http://www.bizmanualz.com/blog/how-are-pdca-cycles-used-inside-iso-9001.html

Another Google reference shown below asks; what is the PDCA Cycle?

The name of PDCA comes from the acronym "Plan, Do, Check, Act" (PHVA in Spanish), and is also known as the cycle of **continuous improvement** or Deming Cycle (because the name of its author, Edwards Deming). This methodology describes the four essential steps that should be carried out systematically to achieve continuous improvement, defined as a continuous way to improve the quality of our products and processes (decrease failures, increase effectiveness and efficiency, problem solving, avoid potential risks ...) .
http://pdcahome.com/english/267/pdca-cycle-continuous-improvement/

I could give more references but I don't have the time to go through the million plus references found on the internet.

Our Mental Models

One of the main concerns about acquiring knowledge is that the understanding of that knowledge will depend on the mental model of the person receiving that knowledge. We all have different mental models based on previous experiences, exposure and application of the knowledge received. I tested the understanding of PDCA with a number of my quality associates and very few of them knew what the principles behind PDCA were. I am very fortunate, or some will say unfortunate, that I was exposed to PDCA application over a 23 year period working for a Japanese organization. They do have quite an in depth understanding of PDCA. I am not saying that they are always right but you cannot argue against their success in world markets. However, I was taught what PDCA actually meant. Not out of a text book but seeing the PDCA cycle rotate every day and continually producing improvement not just on the shop floor but in executive management circles as well. There I was taught the real meaning of PDCA using CAP DO. Check, Act, Plan and "reDo" the continual improvement aspect of the cycle..

Are we taking a step backwards?

Some of us will remember the ISO 9001 requirements standard of 1994 with its 20 elements for offering a consistent product. The product didn't have to be good as long as it was consistent. Then along came ISO 9001:2000 with a focus on continually improving Customer Satisfaction through the use of the PDCA methodology and applying a process approach. I still believe there is nothing drastically wrong with the current standard; however, if we need to change let us change for the better. What is currently wrong is the way the standard has often been interpreted, applied, audited and certified over the past 14 years. Just because not every organization audited and certified was continually improving doesn't mean the intent of the standard was wrong and now needs to be changed to accommodate mediocrity.

Comments on this article will be welcomed by emailing **exec@saqi.co.za**

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RISK IS THE COMPASS™: A NEW APPROACH TO AUDITING PROCESSES BASED ON PROCESS RISKS

by Denis Devos

Reprinted with permission from the ASQ Audit Division Newsletter May 2014 Issue

INTRODUCTION

Historically, ISO 9001 and her sister standards, have not been looked upon as a value-adding and strategically important activity by the organizations that adopt them. As a matter of fact, many Quality Management System implementations are not performed voluntarily, but as a means to achieve marketplace recognition through the third-party registration audit.

It is a pity that organizations do not see (or rather, demand) that the Quality Management System, and their attendant internal audits, can be a key part of their overall operations strategy. Instead, adhering to Standards such as ISO 9001 is considered a necessary evil, and as long as no overly disturbing or challenging findings result during audits, Senior Managers are content to perform this dance with their internal and external auditors in order to maintain their registration, and thereby continue to placate their customers.

The Quality Management System is often seen as intrusive, and interrupting the "real" work of organizations. As a result, Senior Managers can't wait to delegate all responsibility for the System to their Quality Managers. There are several reasons for this fact, all of which have to do with the traditional implementation of a QMS, and the emphasis placed on certain interpretations of Systems by the audit community.

1. Early quality manuals and procedures were written as a series of 20 chapters, each one aligned with a clause of ISO 9001:1994. The new emphasis on "process approach" has promised to solve this, but many organizations still don't understand how to align requirements with their key business processes.

2. Internal Audits are seen as fulfilling a requirement. We perform internal audits to meet the requirements of clause 8.2.2, but expect no more from our audits than that. Senior Managements often don't realize that they have every right to expect findings that will expose areas of risk and move operational performance to a higher level. Audits may also be infrequent. Many organizations perform internal audits only once per year.

3. Quality Professionals are seen as intrusive and out-of-touch. When the Quality Manager and others focus the QMS on adding value, and aligning the System with the strategic needs of the organization, the Quality Management System instantly becomes more relevant.

Much has been written about aligning the Quality Management System with the key objectives of the Senior Management team and the organization. Highest priority concerns centre around such things are market share, customer satisfaction, cost control, profitability, and overcoming obstacles to success. For that reason, Quality Professionals must align themselves with these high-priority concerns, and be prepared to deliver conclusions regarding the suitability of the Quality Management System to support these goals.

"RISK IS THE COMPASS"

The process approach teaches us to not only audit for compliance, but also to audit for effectiveness and efficiency. The definition of effectiveness from ISO 9000:2005 (at clause 3.2.14) is as follows:

> "extent to which planned activities are realized and planned results achieved"

The definition of efficiency from ISO 9000:2005 (at clause 3.2.15) is as follows:

> "relationship between the result achieved and the resources used"

In the past, Quality Management System auditors were taught to audit for compliance to procedures. As time went on, this approach evolved to include the effectiveness of procedures and processes and the efficiency with which these are executed. In the view of this author, we still have one more step to take. Auditing a process within the context of its targets and current performance is good, but not sufficient to fully critique its suitability or optimization. We believe that superior auditing is about conducting a total critique of a process, and that risk is the lens through which this examination should occur.

Often, procedures are poorly defined and unclear. Many organizations try to "overlay" the Process Approach onto their current structure of ISO 9001:1994-era procedures. Although this isn't wrong *per sé*, the task falls to auditors to try to make the linkage between the key business processes of the organization

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and the various disconnected procedures of the Quality Management System. The emphasis on measures of effectiveness and performance targets helps us to add context to the audit, but are we always sure we are measuring the right things? On the other hand, reporting that a process is not meeting its performance targets and expecting the auditee to take corrective action is not very helpful. Our audit should bring back objective evidence of weakness so that the senior management of the organization can take action to improve the process.

When it comes to auditing for effectiveness and efficiency, it is not sufficient to focus on measurables, but we must focus on the ability of a process to anticipate and manage the risks which stand in the way of success. This is the basis for a total examination of process effectiveness.

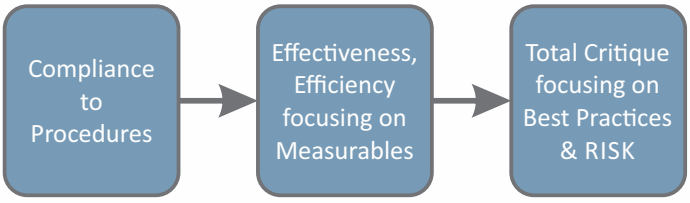

Figure 1: The Evolution of the Focus of QMS Auditing

If "Risk is the Compass", we accept that it points us in the best direction to pursue our audit trails. Perhaps the most difficult aspect of performing an audit is the up-front planning. It is during the planning phase that we determine what aspects of a process we're going to examine, along with who we need to speak with, and what samples would best represent the total process for us. Since auditors understand that they can't possibly ask everything, or see everything, there is a need to derive the maximum impact from the minimum of amount of time. One of the best considerations for maximizing audit effectiveness is to ask questions and pursue audit trails that best reflect the ability of the process to mitigate characteristic risks, (while of course, fulfilling requirements).

Risk is the perfect context to frame hypothetical questions and to test processes' ability to manage infrequent or unexpected circumstances. Audit trails and findings related to process risk (when chosen well) will be seen as insightful and relevant by the auditee, and by the Senior Management team.

RISK AND THE FISHBONE DIAGRAM

The process approach teaches us to look at a process in three dimensions, and not just take the one-dimensional view that auditing only a procedure affords. The process approach is also all about the context of an activity; understanding customer needs and why activities need to be performed in a certain way.

It is helpful to consider the three dimensions of a process along the dimensions of the basic Ishikawa or Fishbone Diagram in its consideration of Man, Machine, Materials, Methods, and Measurement.

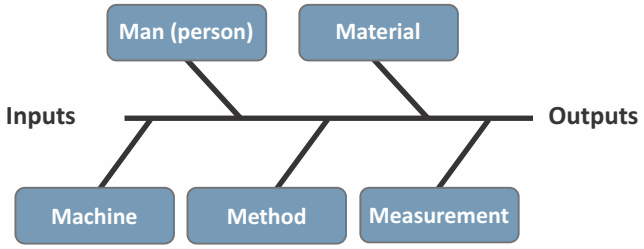

Figure 2: The Basic Fishbone Diagram

THE RISK IS THE COMPASS™ AUDIT MODEL

This model now combines the Fishbone Diagram with a basic flowchart. The first step is for the audit team to create a simple flowchart that begins with the inputs to the process and ends with the outputs of the process. Because a QMS audit should focus on the Big Picture, the model works best when no more than about 6 to 8 process steps are recorded. Simplicity is important, too. Keep the flowchart linear, without feedback loops and other complicating branches.

For the purposes of this model, we combine the 5 aspects of a process (Man, Material, Machine, Method, Measurement) into one broad category called "Enablers". Enablers, simply, are those aspects of a process that "enable" it to function and be successful. There are a variety of enablers such as skill sets, procedures, machines, specifications and standards, approval signatures, etc. Enablers are listed next to the flow-chart block where they apply, and are aligned with the process at every step.

Risks, similarly, are listed in a column next to their corresponding process steps and enablers. In this way, risks are aligned with the process at each step and it becomes very easy to generate audit questions.

There is a very important operational difference between Enablers and Risks. Process risks are characteristic for that process; they are what they are, and cannot ever be completely removed by process design. Risks can be mitigated, but this is a function of the controls (or enablers) that we put in place in response to these risks. The only way to completely eliminate a risk is to undertake a completely different process. For example, driving a car carries with it the risk that the car will break down. This risk will always exist, unless we choose to walk, which is a completely different process for achieving the same purpose. We can reduce the risk that our car will break down by driving a late-model car and performing regular maintenance, but we can never completely eliminate it.

Enablers, on the other hand, are at the discretion of the engineer or process designer, and are completely a function of process design. Enablers should be those mitigation strategies that we put in place to manage and reduce risk, and the impact of a failure event.

As auditors, it is our role to assess the proper balance between enablers and risks, and critique the effectiveness of our enablers

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at mitigating process risk. Process risks should have corresponding enablers to manage them. Auditors should always focus on those risks that do not have appropriate enablers in place to produce a robust process. But just as too few enablers are evidence of under-control, too many enablers for a corresponding risk is over-control, and is a waste of resources. Consider the balance between enablers and risksin the following simple example of a Hiring and Orientation Process in Figure 3.

Input:	Enablers	Risks
Department needs a staff-member		
Manager completes a personnel requisition	Requisition Form #123, Requires a complete justification and full job-description	Job Requirements may be vague Timing may be too short to react
Requisition is reviewed/approved by Human Resources	Business Plan projects Staffing needs: budgets in place HR reviews the Requisition for completeness	No forecast for new hiring Skill may be in high demand
HR posts the job opening and recruits outside the company	Job Posting Boards Succession Plans HR staff has experience and a network of contacts	Not reaching the right target group Outside recruiters not fully understanding our needs
Resumes are received and Reviewed, Interviews Conducted	Hiring Procedure 18-01 Skill of the HR interviewer Dept. Manager participates HR knowledge of governing employment law	Candidates do not always tell the truth Experience may not be applicable to this job HR interviewer may not understand the technical requirements of the job
Offer made and candidate is hired		
Orientation & training During probationary period	Orientation Package #18-02 Employee Handbook #18-03 Training Procedure #18-04 Training Procedure #18-04 Job Description Employee Training Plan	Employee is a poor "fit" Employee doesn't perform duties the "company way" Employee may not have all the skills that he/she said Manager may not conduct training
Evaluation and acceptance as full-time employee	Performance Evaluation Form #18-abc Skill of Department Manager HR Follow-up to ensure the evaluation is completed	Lack of objective criteria or standard method for evaluation Training ineffective Employee not treated fairly Evaluation may be late: unsuitable employee not fairly dealt with
Output: Fully trained, Effective, productive employee		

Figure 3: Hiring Process Example Considering Enablers and Risks

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FLOWCHARTS AS AN ORGANIZATIONAL MODEL

Advocating the use of flowcharts to represent processes and procedures is not new, but a flowchart such as the one used in Figure 3 serves to bridge the gap between processes and auditing. A single flowchart can serve both as a procedure, and as an audit checklist. By adding key requirements and process measures to the flowchart, we have a very complete representation of the entire process with a level of clarity that will allow effective audit preparation. This single-page flowchart becomes the basis for audit questions and a strategy that will enable the auditor to have a clear and concise list of requirements, procedures and forms, along with risks that can inhibit the successful outcome of the process.

Many companies have found it useful to create a set of flowcharts such as these to serve as documented procedures *and* audit checklists. This serves the dual purpose of making documented systems less cumbersome and more aligned with reality, and designing the architecture of their Quality Management System to be more audit-friendly. In this way, we create a series of "procedures" based on the actual processes of the organization, instead of such unwieldy subjects as *Inspection and Test Status*. Constructing the QMS along these lines also incorporates aspects of the business that would not typically emerge in a typical Quality Management System. As an organization begins to list its key business processes, *Scheduling* (for example) is often identified as a very important business process. Anyone who has ever managed a manufacturing plant knows how critical the scheduling process is to their business, yet many quality systems barely consider it. Identifying scheduling as a key business process automatically gives it importance and emphasis in the QMS. At this point it would be expected to create a process map (procedure) and block out the key steps associated with scheduling, along with associated enablers and risks. Now, scheduling becomes a key process, subject to all of the tools and controls of the Quality Management System, including measures of performance, linkage with other processes, and internal audit.

CONCLUSIONS

There is still a concern that Quality Management Systems such as ISO 9001:2008 and ISO/TS 16949:2009 have not yet lived up to their full potential, as important sources of feedback and performance data for Senior Managers. Although the process approach to auditing has improved this fact a great deal, there is still a lot of room for improvement when we actually *construct* our Quality Management System using the concepts of the Process Approach. Our focus on performance and measurable results has increased the credibility of the QMS, but we are not yet fully aligned with what is important to business owners and executives. Risk is an important consideration that is too often neglected when planning and implementing a Quality Management System.

"Risk is the Compass™" that leads us in the right direction during an audit. Findings based on risk will be relevant, and aligned with what is important to Senior Management. Findings based on risk will seldom seem nit-picky, or the result of an auditor with their own agenda. Experience has shown that good audit findings, those which expose operational risks, will solicit a sincere thank-you from Senior Managers.

Using the flow-charting approach described here, auditors and their client organizations will benefit from using a tool that will deliberately and visually emphasize risk as an important focus of their Quality Management System.

About the author:

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A reflection of why ISO 9001 based Quality Management Systems don't seem to work for most organizations.

By Joseph Mwansa *SAQI Senior Member*

Introduction

After going from organization to organization over the last 15 years, either conducting training or audits, particularly in Africa, I have come to a conclusion that most of them do not benefit from the implementation of the ISO 9001 requirements standard as a reference for their quality management system (QMS).

Most of them believe that it is the ISO 9001 Standard that will bring the benefits and do nothing about laying the foundation for it to work. Most Top managers are so detached from operations and always blame the people tasked with the mandate of monitoring the QMS. This is usually the management representatives, and the auditors or in some cases external certification bodies.

My conclusion among other things is that most organizations:-

- Regard quality management systems as entities-separated from "the core Business".
- Have QMSs that are not supported by the necessary leadership they deserve;
- Ignore dealing with an individual preferring to deal with the matter at "organizational" level only or focus on one aspect of QMS

In this paper, the approach taken is to show that indeed, a quality management system cannot work unless certain prerequisites are attended to. The approach taken is from **the business and strategic management perspective** and later brings in QMS as a tool in achieving the chosen strategy.

The intention is not to bore the reader with the background of quality management systems but I would like to point out here that quality impacts on three levels, namely, personal level, team level and lastly at organizational level. It is an organization wide intervention tool for assisting to run an organisation just like many other tools such as Total Quality Management (TQM), Quality Cycles, Appreciative Inquiry, Six Sigma and Lean Systems among many others.

What these "interventions" have in common is the process and system approaches respectively. The question is how then can we use these to intervene at individual, team and the organization levels?

Another useful question is should organizations focus only on one aspect when implementing a QMS? Should it focus on people, on the process or on the structure?

Process, people or Structure

Contemporary theorists can be categorized as process-focused, structure-focused and people-focused.

Process-focused:-Flow of money, information, resources.

Bad management of finances, lack of flow of information on the vision, mission, policies and resources that include infrastructure, environment, support services and human resource is a sure recipe for failure.

People-focused:-Individual & cultural changes.

The Human outputs include, productivity, absence, turnover, deviant, behavior, workplace, citizenship and satisfaction. The individuals' behavior must be in sync with that of the organization. An individual must be managed. Programs such as Work-life balance and talent management are some of the tools available to management. They are designed to achieve individual satisfaction, address absenteeism, and address low morale and bad behavior and so on.

Structure-focused:-Re-engineer; re-invent re-thinking how we do things.

Work specialization; command & control; centralize / decentralize.

It becomes clear from the above that we need to focus on all of them. That is where the system thinking comes in. See a typical network of systems in figure 1 below.

Figure 1

There are many theories and definitions but for a moment, I will not deal with quality management systems definition of quality but on other gurus about the subject.

Systems Theory

A 'system' is described by Laszlo and Krippner as:

"... a complex of interacting components together with the

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relationships among them that permits the identification of a boundary-maintaining entity or process."

We can derive from the definition above that a 'system' has multiple and different parts (units) working together to achieve a purpose. According to Brown, a 'system' has five qualities that are useful to keep in mind in designing the model and process to be followed:

- A 'system' is designed to reach an objective
- A 'system' has a recognized arrangement
- In the recognized arrangement, the elements are dependent
- The 'system' has a definite flow

The 'bigger picture' of the 'system' is more important than the individual activities/elements.

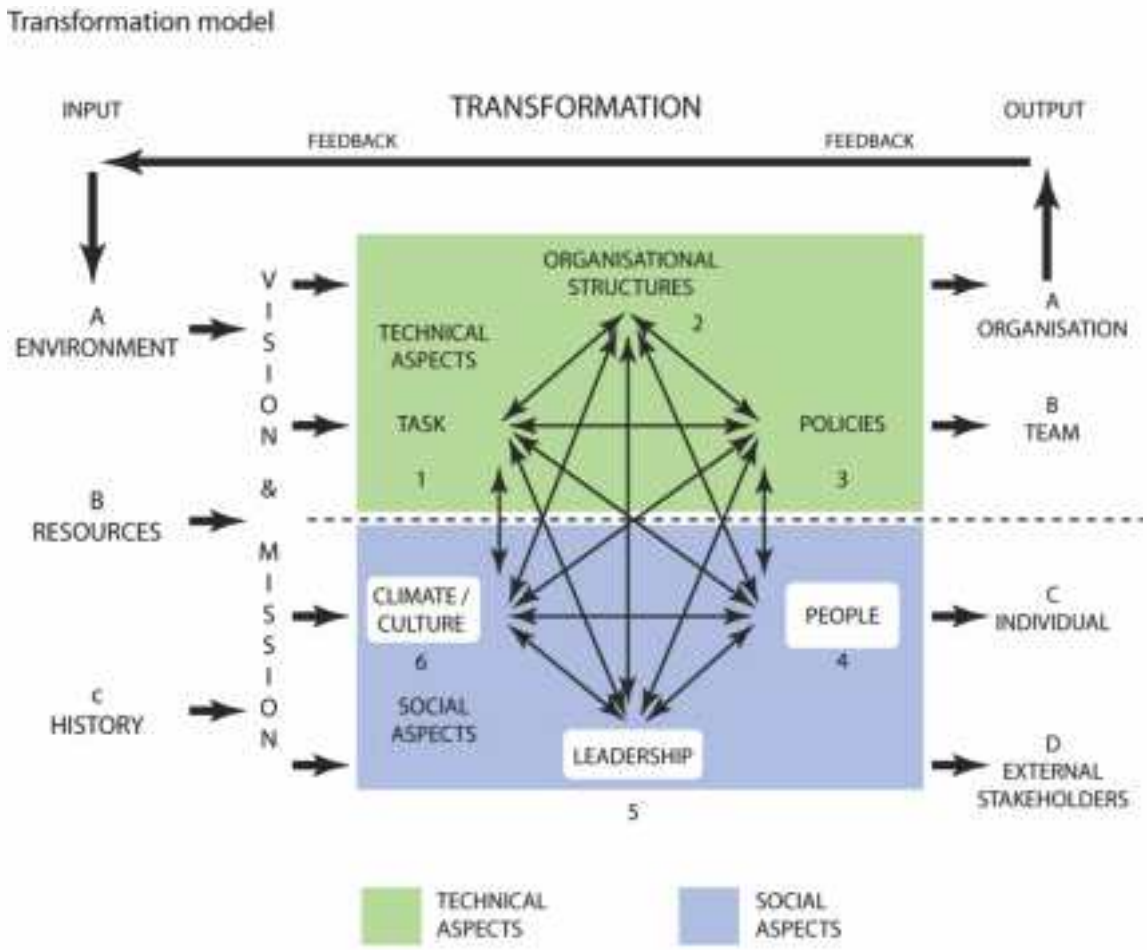
Systems theory focuses on complexity and interdependency. This means that a 'system' is viewed as a whole with its subsystems and the relationships between the subsystems.

Anderson states what a system theory is:

"... is an interdisciplinary approach of evaluating how various parameters, characteristics, or phenomenon interact; and focus primarily on the effects of those interactions."

See example of a transformation model below to demonstrate the interdependent of variables involved in the system.

Figure 2



Pre requisites For a Quality Management System (QMS) to work in any organisation....

Implementing a QMS is a strategic decision, meaning it is a top management decision. That means it is part of the strategy that is driven by top management.

The environment must therefore be correct for a QMS to succeed. Mc kenzie 7s model can help in "preparing the enabling the environment for quality management system implemention.

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The model suggests for example that for the strategy to be successfully implemented (remember a QMS is a strategic decision, therefore it is a strategy itself), top leadership:-

- must articulate what the organizations' **shared values** are;
- must have a leadership **style** that makes the individuals want to achieve it for himself/herself;
- Must deal with the required **skills**;
- Must have a structure that supports implementation of a system such as a QMS.
- Must have a working **system**
- Have competent **staff** that are well motivated and trained in the tasks that must be done.

implanting a QMS. The how may vary from organization to organization but emotional intelligence or spiritual intelligence are some of the most common. The idea is for the individual to realize that those are but the myths. Individuals must be helped to align with the teams and that of the organization's shared values' thinking.

- Shared vision-: as commented above

Note that a team learning Organization has a complex network of interacting subsystems. Patience should always be exercised Schermerhorn, came up with the model below of phases in the transformation from stereo type thinking to team thinking.

Figure 3

(Schermerhorn, 2004:242)

At the centre is an individual who must react to the above i.e. the style of leadership, the strategy, the values and so on.

For quality management systems to succeed, Individuals, teams and organisation's aspirations must all be dealt with. All the three must be aligned with the strategic direction as articulated by the leadership of the organisation.

Leadership creates shared values that individuals abide by, shared values lead to culture, and culture (that is a way of doing things) leads to desired behaviour.

Note that individuals come from different backgrounds with different mental models and may not share the vision of the leaders. Senge talked of the "fifth discipline" and identified the following:-

- Systems thinking
- Personal mastery- Individuals being given the tools to flourish at what they are good at
- Mental models- Stereo types or myths that are passed from generations to generations such as Africans are thieves or white people are racist. These mental models are entrenched and so must first be dealt with before

It is also suggested that firstly, a correct diagnosis is important before engaging in the change mode! See Malhotra below on the phases of doing so.

Suggested Interventions at the three levels under discussion are as follows:-

1. Individual

    - Career
    - Coaching
    - EQ; SQ
    - Consciousness
    - Well-being

2. Group /Team

    - Team coaching
    - Teams & Roles
    - Communication
    - Conflict; dialogue circles;
    - Training

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3. System /Organization

- Culture surveys & change
- Values implementation
- Leadership / Management
- PM; Bench-marking;
- Whole-systems change

Figure 4

Other important pre requisites include

1. Strategy
2. Scanning (Use tools such as Pestle, SWOT, Porters Value system analysis,)
3. Vision (Short, powerful, memorable; describes what we want and where we are going)
4. Mission
5. Issues (Themes identified in the scanning)
6. Goals (Verb – what needs to be achieved)
7. Objectives –SMART (specific, measurable, attainable, reasonable and time bound)
8. Operational plans

The company wide intervention that will help you drive the process

- TQM
- QMS
- Quality cycles
- Appreciative inquiry
- Virtual teams
- Six sigma
- Lean systems

Conclusion

In conclusion, it is important to then ask another question. What is a QMS?

To me, it is a tool not only to drive the process but also to make the process work.

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Book Reviews

By Paul Naysmith

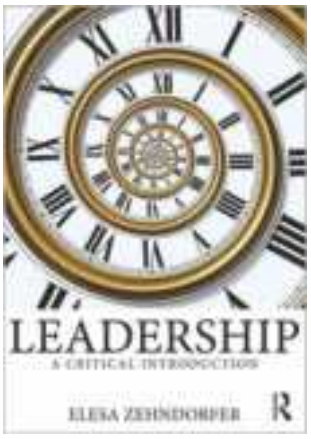
Book review Driving Honda – Inside the World's most innovative car company

Author: Jeffrey Rothfeder
ISBN: 9780670920563
Book Reviewer: Paul Naysmith

In a crowded market place for Quality books on Japanese automotive super stars, Mr. Rothfeder already has difficult challenge ahead of him, as I've read most of them. The book attempts to compress the entire history of the Honda Car Company and its approach, leading in from the opening of a new factory in nowhere America. In his book he attempts to explain how that Honda is not your conventional car maker, with the obvious comparisons to Toyota in the start, it covers everything from how Honda leaped from making motorcycles to becoming a "local multinational".

What I didn't like, was that throughout the book there were clumsy examples of other companies in non-related industries were thrust into a very interesting examples of how Honda does things. This would interrupt the flow of my concentration, and would I just give up on that chapter or I would hurriedly move past the intrusion to get to the more interesting Honda bits.

I presume that the real challenge is that Mr. Rothfeder, being an outsider of the company (or industry) looking in, is perhaps attempting to cash in on the other books in this section of the Quality library. Allowing his journalistic license to run on cruise control creating a book on interviews does have its place; however it misses the opportunity to have a story as innovative as Honda. If you are looking for practical applications for Honda's quality philosophy, I would recommend looking elsewhere. This book is for Quality Historians, not Improvement Ninjas.



Book review of "Leadership – A Critical Introduction"

Author: Dr. Elesa Zehndorfer
ISBN: 978-0-415-62594-4
Publisher: Routledge
Book Reviewer: Paul Naysmith

Buy this book. Don't even think about it for a second. Buy it now. Why are you not yet doing something about purchasing, however continuing to read this review? I think that I've figured you out. You want to know why, and you want an explanation to my recommendation. You are a tough Quality fighting machine, and I'll take you on. So here it goes, get yourself into the receive position.

Dr. Elesa Zehndorfer has done something wonderful for academic text books. A gorgeously written work on an introduction to leadership, this should be, no scratch that last statement, this is the benchmark for anyone wishing to learn more on leadership and management. The eleven chapters that Dr. Zehndorfer has written are so very well structured, constructed, and designed, they deliver knowledge direct into your brain, as if a hatch in your skull has been lifted, and liquid genius has been poured to the maximum fill level.

Each chapter has been crafted with skill. Granted it is written for undergraduate or perhaps postgraduate students, however as a business leader, I can see you getting the benefit from it. In every chapter there are "expert insights", case studies and a quiz. Beyond the book, there are tutor resources available through the Routledge (the publisher) website. It is very evident that Dr. Zehndorfer has performed comprehensive research; however she has the ability to convey complex theories or studies in an elegant fashion, which has the subtle tones of passion on this subject that shines through her writing. This is a rare talent, which few in this writing category can exhibit.

Ahhh urrggg, and ohhh! Somehow my naturally negative Scottish disposition is trying to fight through... I must... say... something... about how... this text book... is wrong: well the only thing I can find fault with this book, it is too intelligent for its own good. Heck if that is the worst I can see it this book, it must be pretty good.

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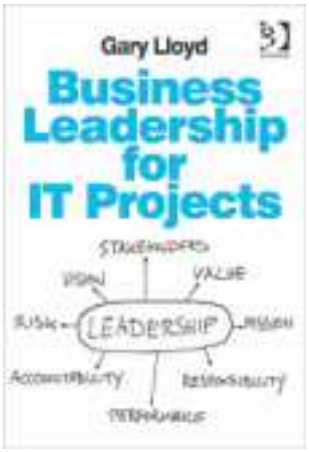

Book review: Business leadership for IT projects
Author: Gary Lloyd
Publisher: Gower
ISBN: 978-1-4094-5690-2
Book Reviewer: Paul Naysmith

I have been fortunate enough that I have personally led many Quality improvement projects; some have been an Information Technology (IT) solution to a "Quality" problem. I can at first hand relate to the benefits of my good project management, and unfortunately, other people's less than professional approach. When approaching the review for this book, I had my eagle eyes ready to see where and how the author Gary Lloyd addresses the poor leadership of IT projects.

Mr. Lloyd is a veteran IT enabler and working across many countries and businesses, shares his approach to achieving successful IT projects, directly aiming this book at a "leadership" level. I like this book in its one hundred and seventy page briefness, and how it doesn't labour on, like other similar books that would be placed alongside it in a bookshop. It is very well written, it is easy to read and the language laid down on paper does allow it to flow. I like the hand drawn diagrams, how that they are not computer line straight, however real and genuine, if the author was drawing them just for you on a white board, in a private tutorial. The case studies used sparingly are relatable and do not become overstressed, used carefully to make a very well thought out point or underline the theme in the chapters. I found the tools and techniques, although I already do use them, actually very well expressed and I would see how they are articulated in the author's personal way, would be useful for those readers that would struggle with the four thousand page text book of project management tools.

So did my eagle like vision see where the weakened prey of poor leadership in Mr. Lloyd's book? Well he and I would positively agree on why the management of any project would fail, and I think he and I have learned this from real world application: leadership failings. What I did like was that how he has applied this life lesson into checklists, to identify where to firstly recognize leadership gaps, and how to then manage this into a positive outcome.

Gower Publishing does it again, publishes a very decent book, both hard copy and ebook at a price point that can only be in the spectrum of ridiculousness. I cannot but feel sympathy for Gary Lloyd, and a fear that his work will only be seen or taken on by an insignificantly little number of buyers.

Book review of corporate risk and governance
Author: Alan Waring
Publisher: Gower
ISBN 978-1-4094-4836-5
Book Reviewer: PaulNaysmith

Well this book (in the author's words) is "not a risk management 'cookbook'", which is a shame really, as that would specifically be a niche book, and probably a differentiator of any cookbooks that I'm aware of. There is something appealing about the idea of colourful pictures of a delicious looking meal that would have to be put into risk management terms... I digress and should get back on point and review Alan Waring's book on 'Corporate Risk and Governance'.

Firstly I'm fairly impressed by the author's credentials: over thirty years experience in the field, global exposure to the subject, multiple printed titles under his name, consulting to industry and government alike. However as Mr. Waring does state in a chapter, I shouldn't take his CV on face value without doing my due diligence, and perhaps interviewing him at his home. Now for all book reviews you've ever read, that last statement on going to his house, may make you think a little. And here is the premise of his book: to be a thinking aid on corporate risk management, rather than a how-to-guide.

Oh how he make me think. He did this through expressing some tricky legal or legislative principles, using case studies or his opinion. I liked his many case studies early on in the book; however it did become wearisome in later chapters. To borrow from a football metaphor, it's like a book of two halves: the first half I thought was particularly useful for an executive trying to understand corporate risk management, stimulating my cranium, and the second, not so useful. This was mainly case studies, and the many on the goings on, of corrupt Cypriote practices.

I did like Mr. Waring's writing, however I am a touch confused to whether or not recommend it to fellow quality professionals. I think that it would be best suited for those who are looking to a get a brief history of corporate risk management from the past fifty years, or on Cyprus corruption. The book does well in where it examines many 'failed' businesses, where they never did risk management, and I see that useful for a student studying this subject for an essay submission.

Finally, Gower publishing, you never fail to impress, or actually impress me on the price. For the love of selling books, please lower your prices on books like this. I think you are alienating so many potential readers or scaring them away. Mr. Waring, I do hope that you don't mind me offering my book (with hand written notes) free to the first person that writes and asks for it.

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Don't “Kill Bill”

By Jacques Snyders

The reason for this submission is a follow-up on the article in last month's SAQI e-Quality Edge, August 2014 by “Bill Coetzee” in, which Bill gave us a first-hand insight on how employees experience Continuous Improvement initiatives, forced down by top management on its people.

I really enjoyed that article, and as Bill mentioned, the role consultants play, in such a mind-set change. When I was thinking about the title for this follow-up article, it struck me, that there might be two corners that would like to “Kill Bill” for his article. One corner being management that are trying to implement these World Class Manufacturing (WCM) principles and one being the consultants, selling WCM as the silver bullet to management. So I borrowed the title for this article from the 2003 movie, featuring Uma Thurman, called “Kill Bill”, but with a slight twist, “Don't Kill Bill”.

I can really familiarise with Bill and others such as Bill, for the way they experience WCM initiatives on the shop floor. I have been on both sides of implementing WCM myself, starting off in the motor industry with Nissan and other world class manufacturing suppliers for the motor industry. Later I moved to “the other side” spending almost 3 years with a South African Consulting company, implementing Lean for a quick buck. So I understand Bill's frustrations. The majority of these initiatives are being forced down on employees at such a rapid rate and in most cases only through theoretical class room training, that the reason for it being implemented is not properly communicated and the impact not explained to the workforce. These principles are also implemented in a “Plug & Play” manner, not taking into account the maturity level of the organisation. This is a key aspect that should be considered when implementing WCM principles such as Lean Manufacturing.

Management do not want the consultants to cost them an “Arm and a Leg”, and consequently only a small group of people are trained to implement these principles, with the guidance of the consultants. The consultants on the other hand, know very well, that they need to prove to management, that they can at least come up with a Return on Investment (ROI) of at least 3 times the amount it will cost the company on WCM training.

So what's the typical game plan?

1) Train as many people as possible.
2) Help them to select improvement projects to run on their own (with some coaching assistance from the consultants)
3) Give extra coaching hours to those easy money projects, and ensuring that they are pushed through (even if they need to get top management involved in ensuring that it's being implemented)
4) Track the savings from these projects (the approximately 30% that actually do complete their projects)
5) Celebrate the success of the program on a Monitory value only!!!

The unfortunate problem with this approach is that through all of this, we have forgotten the operators. The very people that need to sustain these new projects and principles. The initiative rarely ensures a proper culture change and most of the projects have not improved the lives of one single operator.

One such improvement initiative I witnessed was at a heavy engineering company in South Africa. I got wind of a Kaizen initiative that was planned for the weekend, and which needed to be finished by Monday morning. This was because the CEO and his management team, would be coming through on Monday morning to see what Kaizens have been implemented in the area. The team was planning, not surprisingly, a “5S” Kaizen. Why a 5S kaizen? Well, for obvious reasons, it's one of those tools that visually instantly impresses anybody and gives the impression of WCM. I was not going to stop the team from improving the visual area, but I did meet up with them in the area, and we had a long conversation with the operator. After asking the operator what his daily challenges were, and what he would improve if he could make one improvement, he quickly showed us, the state of his welding jig. The toggle clamps were broken, and had “play” in it, which caused welding quality problems, specifically downstream in the final robot welding station. As the operator explained, this was the reason why the technician was re-programming the robot welder on a daily basis.

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At the end of the day, they did paint the production station; also they re-furbished the welding jig, added it to a maintenance schedule, and ultimately improved the robot welding down time by 50%. Now, that is what Kaizen is all about, improving quality, productivity and helping operators in their daily work, not painting floors to impress the CEO.

What one needs to understand of WCM principles, is that they are like Bill mentioned, based on strong elementary principles and foundations. There is no way that any organization can even think of implementing Just-in-Time principles such as Kanban, if work standards, basic TPM (Total Productive Maintenance), a strong problem solving culture and consistently working to TAKT time with manageable bottlenecks, are not in place. Unfortunately consultants are normally only looking at implementing the Kanban principles, as a quick means to reduce inventory, and record stock reduction savings.

So my advice for all the CEO's who are thinking about implementing WCM, is that there is not a "Silver Bullet", and nothing comes overnight. Firstly as management, you need to commit to the program, and spend time implementing these principles as part of your companies DNA. WCM programs fail, because management does not commit to changes, and WCM fails, because of change not happening on the floor. Thanks Bill!

About the Author

Jacques Snyders has 19 years of experience in Operations Management, which includes Production, Quality, Engineering Management as well as Business Improvement.

He is a Senior Member of the South African Quality Institute

Announcing a new SAQI training course

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Kaizen (改善, is Japanese for **"Continuous improvement",** or **"change for the better".** It refers to the philosophy or practices that focus upon continuous improvement of processes. The literal meaning can best be described by the flowing definitions:

Kai = Change
Zen = For the better

The Toyota manufacturing system is based on this philosophy of Continuous Improvements (Kaizen's), and is used daily to improve a process when inefficiencies and opportunities for improvement are identified.

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Venue: SAQI training centre, CSIR, Pretoria
Cost: R4250 per delegate incl. VAT
Booking Vanessa@saqi.co.za
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B-BBEE: AN ACT IN PROGRESS . . .

By Terrance M. Booysen

Since the original launch of what was first known to be the Black Economic Empowerment Act No. 53 of 2003 ('the Act') which was signed into South African law in January 2004, the Act has seen many changes. The emphasis of the Act has always been on 'black' people and the critical need to transform their dire economic and social conditions which were brought about as a result of the past 'apartheid' system where Africans, Coloureds and Indians were excluded from almost all sectors of the country's benefits and development.

With an understanding of the African National Congress' ('ANC') Freedom Charter of 1955, the Act was developed and refined upon the requirements of the Reconstruction and Development Programme ('RDP'). The RDP was developed as a South African socio-economic policy framework by the ANC government in 1994 as a forward looking plan to transform and mobilise all South Africans in an effort to -- amongst other -- alleviate poverty caused through the Apartheid regime, as well as eradicate the white business owner's elitist privileges of pre-1994.

"The pressure on business of all sizes to do more to empower black people is growing relentlessly. The sooner they start doing this, the better they'll be able to survive, and in fact prosper."

Executive Business Brief
(February Issue 2004)

The efforts to build a new democratic, non-racial and non-sexist society and economy have for all intent and purpose not been achieved since the Act's debut, and South Africa is still regarded as one of the most unequal societies in the world. Over a decade since the original BEE Act was launched, the country still experiences massive gaps in education, healthcare, job creation, unemployment and social insecurity. Indeed a lot has been achieved since the country was liberated from its apartheid shackles; however the extent to which the majority of black people participate meaningfully in South Africa's economy remains limited. Whilst South Africa continues to remain a largely divided and unequal society, the stability and its economic prosperity continue to be undermined. If these imbalances continue, there's no doubt that the consequences will be to the detriment of all South Africans, irrespective of their race.

Due to the fact that the Act has not yet achieved its original objectives to 'normalise' the country's unbalanced racial differences, there is now an even greater chance that any party who interacts with South Africa will -- directly or indirectly -- be impacted by the additional efforts legislators are introducing through the revised Broad-Based Black Economic Empowerment Amendment Bill 2013 ('the B-BBEE Bill') and its revised Codes of Good Practice on B-BBEE ('the Revised Codes'). These re-focused efforts are all designed to equalise and level the economic playing fields; and continuing to pay lip service to them is guaranteed to be costly.

The revised B-BBEE Bill and the Revised Codes provide the legal framework for the application of B-BBEE in South Africa. Both the Bill and the Revised Codes have undergone significant amendments that will impact the manner in which B-BBEE will be measured and implemented within organisations operating in South Africa. The amendments reflect a shift from a voluntary approach, to a more punitive approach in government's new B-BBEE policy. For example, the B-BBEE Bill introduces offences and penalties, including imprisonment of up to ten years for natural persons; or a fine of up to ten percent of the organisation's annual turnover for juristic persons. Furthermore, the Revised Codes create 'priority elements', where certain organisations must obtain at least forty percent of the allotted targets or points, failing which, their B-BBEE level will be 'discounted by one level'. The Revised Codes may result in a drop in the B-BBEE level within some organisations and this may be caused by various factors which may include: (i) an increase in the points needed to qualify for the various B-BBEE levels, and (ii) adjustments to the B-BBEE elements and revised scorecards used to calculate B-BBEE points.

Organisations conducting a business, trade or profession in South Africa, with an annual turnover of less than fifty million rand may benefit from the amendments of the Revised Codes. For example, the compliance thresholds for Exempted Micro Enterprises ('EMEs') and Qualifying Small Enterprises ('QSEs') have been increased, resulting in certain organisations falling into less onerous categories. Furthermore, EMEs and QSEs are no longer required to obtain a B-BBEE certificate from a verification agency - instead an affidavit confirming the B-BBEE level of the organisation will suffice. In order for organisations to maintain (or increase) their current B-BBEE level, they must identify and address the amendments to the B-BBEE Act and the Revised Codes.

As is the case with the many good intentions which underpin the amendments of the B-BBEE Act and its Revised Codes which were introduced in October 2013; one must also consider some of the criticism being levelled against the Revised Codes which

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come into effect in May 2015. A number of critics argue that the Revised Codes have not really addressed the problems of the previous Codes. Moreover, whilst the B-BBEE points-to-levels-table has changed, many organisations will not be able to maintain their existing B-BBEE level if they do not dramatically increase their B-BBEE efforts.

"International studies show that in countries where legislation is more enabling - for example, in Brazil - there are far-sighted company directors who are taking a pivotal role in regard to corporate involvement on entrenched societal issues.

These leaders are rethinking the social aspects of their business strategies and are aligning these with societal needs. They are working together with the government and civil society and the results are now apparent - Brazil's notorious rating as the "most unequal" society on earth has declined, while it is South Africa that has taken over this unenviable position…

… It remains to be seen whether leaders with the audacity to do things differently, and to invite communities into their world, will emerge. Certainly the proposed amendments to the B-BBEE codes will do nothing to facilitate such a paradigm."

New B-BBEE codes will harm the poor and marginalised
(28 November 2012)

As a result, many organisations may in all likelihood automatically drop in their levels of compliance and in other cases they may simply become non-compliant. For example, the old level eight B-BBEE level organisation -- which was the lowest possible B-BBEE compliant level -- required between 30 and 40 points. In the Revised Codes, the same organisation will now require between 40 to 55 points to remain a level eight B-BBEE compliant organisation. If for some reason this organisation cannot gain the additional points, it will automatically fail in its B-BBEE scorecard. In this respect, EMEs and QSEs may now become more discouraged to expand their businesses and purposely remain small by ensuring their turnover remains below certain thresholds to avoid the additional B-BBEE requirements (organisations who remain below ten million rand per annum are automatically B-BBEE compliant). Clearly this approach will contradict the original transformation intentions of B-BBEE and employment of more black people will become even more elusive if organisations battle to meet the new B-BBEE requirements and become fearful of their non-compliance.

Rather ironically, whilst it may be easier for smaller organisations who fall below the annual turnover threshold to become automatically B-BBEE complaint, because there is still no revised B-BBEE scorecard for these organisations, they will at this stage also be regarded as non-compliant come the beginning of May 2015. Compounding matters yet further, the Department of Trade and Industry ('Dti') have recently announced a change in the manner that organisations will be vetted in terms of their B-BBEE verification and scores. Verification agencies will be downgraded to "empowerment advisers" and the Dti will take the verification process in-house. The Deputy Minister of Trade and Industry, Mr Mzwandile Masina, stated that "verification agencies undermined the government's development goals" and "it must be difficult for you to get a (BEE) certificate". The process **the Dti** will follow to verify the BEE status of organisations is unclear at this stage; creating more uncertainty regarding the practical application of BEE in South Africa.

This article was reviewed by Transcend Corporate Advisors for its accuracy only. Transcend Corporate Advisors have not furnished advice as regards the content of this article.

More information regarding CGF can be found at **www.cgf.co.za**
More information regarding Transcend Corporate Advisors can be found at **www.transcend.co.za**

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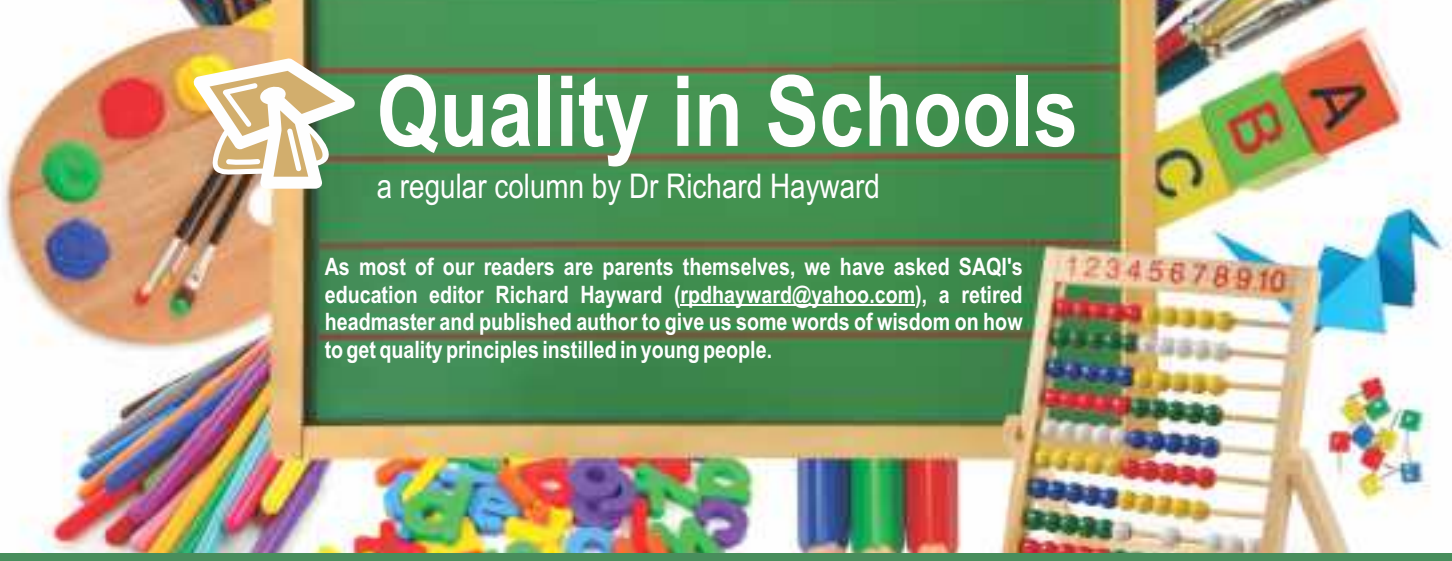

Quality in Schools

a regular column by Dr Richard Hayward

As most of our readers are parents themselves, we have asked SAQI's education editor Richard Hayward (rpdhayward@yahoo.com), a retired headmaster and published author to give us some words of wisdom on how to get quality principles instilled in young people.

It's exam time: go play!

by Dr Richard Hayward

Well, not quite all the time! End-of-year tests and exams are almost here. There's a rise in stress levels in many classrooms and homes across the land. Depending on how the stress is handled, the emotional responses can range from tiny tremors to volcanic eruptions. How can we deal with exam-time stress and still ensure that children do well?

Maybe we can take a winning tip from our Proteas cricket team. Recently they played in a triangular cricket competition in Zimbabwe. Besides matches against Zimbabwe, the South Africans also had to play against their fierce foe on the cricket field ... Australia. It was interesting to compare how Australia and South Africa prepared for their first match.

In preparation, the Australians had a training session at the Harare Sports Club. What did the South Africans do? They went fishing for tiger fish and enjoyed leopard-spotting amongst the wildlife of Zimbabwe. A few adrenalin-fuelled team members bungee-jumped off the Livingstone Bridge at Victoria Falls.

When the two sides played each other in their first match, South Africa trounced Australia by seven wickets.

A common trap that many families fall into at exam time, is to put in an extraordinary number of hours of revision work. Yes, there's a need when exams loom to put in the extra time. Yet the early dawn and very late night study sessions can be hugely counter-productive.

As the familiar one liner states: 'It's the Quality and not the quantity that counts.' Balance is needed. When the child is drawing up the study revision timetable, make sure that there's enough time every day to play and relax. An outdoor activity will help give new energy when it's time to sit down at the books and the computer.

There's the little quip of two mothers talking about their high-school children. The topic turns to studying for exams. The one mom states that her daughter is in Grade Ten and there's so much studying to do. In reply, the other mother moans, “You think that's tough. My son is in matric and I don't think I'm going pass!”

Dr Dereck Jackson, an eminent psychologist and former deputy principal, gives sage advice to those parents who take over their children's responsibility as regards homework and study. It's to remember that the children – and not the parents – have to pass tests and exams. The parents' responsibilities are to provide a proper study area where the children can work; they are to establish a regular adhered-to daily study time and ensure that background noise is kept to a minimum. There's evidence that proves that quiet background music with no songs or words is good. Bach is in, Bieber is out!

Besides having study breaks every day, have a day a week where there's a complete break from any school work. Such relaxation will help recharge the brain. The proverb tells us that all work and no play makes Jack a dull boy. Educational research confirms the truth of the proverb. A 21st century update of the proverb could be: All work and no play get Jack and Jill dull results.

If you have children writing exams soon, help them find the healthy balance between work and play. When that's done, the school year will have an undoubted successful ending. May the stress levels be low and the marks high!

Under the aegis of SAQI, Richard Hayward does Continuing Professional Teacher Development (CPTD) programmes. They are recognised by the South African Council for Educators and earn Professional Development (PD) points. For more details, please go to www.saqi.co.za or contact him on rpdhayward@yahoo.com. Poor Schools are sponsored.

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B41	Introduction to Quality Control	1	R2,500.00			9		18
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B64	Introduction to Quality Techniques	3	R5,000.00			10-12		19-21
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