

DIAGNOSTIC TOOL KIT (GENERIC)

COMPANY ‘ _____ ’

The purpose of this generic (general across all functions) first stage diagnostic is to evaluate a company’s baseline and establish areas of weakness or strength.

At this stage no formal analysis should be undertaken. This tool kit is designed to collect baseline company information, from (a) the decision maker (b) observation from reporter.

The tool kit should be completed by the company decision maker and evaluated i.e. questioned by the observer. The time to complete this document (paper or disk) should be no more than 30/45 min’s. The decision maker should feel that he/she has full ownership of the tool.

Following the first stage activity, a more comprehensive i.e. specialist diagnostic should be undertaken. The areas for this specialist diagnostic will be determined from the analysis of the generic tool kit.

The specialist tool kits should be uniform and off the shelf. This specialist diagnostic should last 1-2hrs and involve all the relevant people.

I propose a scoring of each response 1-5 (1 being the lowest or nil, 3 middle ground or n/a and 5 being the highest or full compliance). All questions must be quantifiable, measurable in terms of QCD and/or related to supply chain development. The calculations required for this tool kit i.e. the model, will be determined later.

GENERIC DIANOSTIC TOOL KIT (suggested typical specialist areas and questions)

SCORING MODEL

Q1 Is there a written financial plan?

Example:

Score 1	No	X
Score 2	Yes (but not available today)	X
Score 3	Yes	X
Score 4	Yes (reviewed quarterly)	ü
Score 5	Yes (reviewed monthly and measured)	X

Answer = 4

FINANCE

Q1	Is there a written financial plan?	C
Q2	Is very function of the bus iness separately accounted i.e. unit price/costs?	C
Q3	Is the business showing actual profit and is it planned?	C
Q4	Is the turnover planned?	C
Q5	Is the business VAT registered?	C
Q6	Is the investment ration i.e. borrowing managed and planned?	C
Q7	Are the targets for cash flow managed and planned?	C
Q8	Are there adequate accounting procedures in place?	C
Q9	Shareholder dividend?	C
Q10	Is there a staff pension in place?	C
Total		C

FINANCIAL CONTROL

Q11	Is there a written policy for the financial control?	C
Q12	Are the management accounts available?	C
Q13	Are the financial staff and management trained/qualified?	C
Q14	Is any analysis complete for pervious accounting periods?	C
Q15	Are forecast managed and planned periodically?	C
Q16	Are you satisfied with your accountancy firm i.e. service?	C
Q17	Are you satisfied with your banking arrangements?	C
Total		C

MARKETING

Q18	Is there a written marketing plan?	C
Q19	Is your brand known i.e. corporate image?	C
Q20	Is your product/service known?	C
Q21	Do you have a Public Relations strategy?	C
Q22	Do you have a web site?	C
Q23	Do you undertake any research?	C
Q24	Do you have dedicated marketing staff?	C
Q25	Is the marketing function across the whole business?	C
Q26	Are all your staff aware of the market(s) place?	C
Q27	Do you complete any analysis i.e. swot etc?	C
Q28	Do you measure the product life cycle?	C
Total		C

SALES

Q29	Do you have a written sales plan?	C
Q30	Are the sales targets managed and planned?	C
Q31	How are your sales staff paid?	C
Q32	How is the sales territory divided?	C
Q33	Average lead-time from completed sales invoice to delivery?	C
Q34	Average discount allowed per sale?	C
Q35	Average time for 'request for quote' to be completed?	C
Q36	What is the performance of sales?	C
Q37	Do you export any product or service?	C
Total		C

OPERATIONS

Q38	Do you have written standard operating procedures?	C
Q39	Do you measure customer satisfaction?	C
Q40	Are you satisfied with your logistics and delivery schedule?	C
Q41	Do you measure 'not right first time'?	C
Q42	Do you measure stock turns?	C
Q43	Do you measure overall equipment effectiveness?	C
Q44	Do you calculate value added per person?	C
Q45	Do you utilise floor space?	C
Q46	Do you collect, measure and control statistics?	C
Q47	Is visual management used?	C
Q48	Do you measure part per million (PPM)?	C
Q49	Do you use lean manufacturing techniques?	C
Total		C

QUALITY ASSURANCE

Q50	Do you have written QA policy?	C
Q51	Do you have accredited QA systems?	C
Q52	Do you have dedicated QA staff?	C
Q53	How often do you complete an Internal audit?	C
Total		C

HUMAN RESOURCES

Q54	Do you have a written HR policy?	C
Q55	Do you measure staff absence rates?	C
Q56	Do you plan and have a policy for staff leave?	C
Q57	Are you fully recruited?	C
Q58	Do all your staff understand the company goal or mission statement?	C
Q59	Are the staff regularly reviewed?	C
Total		C

TRAINING

Q60	Are your staff fully trained?	C
Q61	Do you encourage individual continued professional development?	C
Q62	Do you have a written training policy?	C
Q63	Do you have dedicated training staff?	C
Total		C

LOGISTICS

Q64	Do you have a written logistics strategy or plan?	C
Q65	Do you own the transport?	C
Q66	Is the logistics coordinated with sales and delivery?	C
Total		C

MANAGEMENT

Q67	Do you have a written short, medium, long-term business plan?	C
Q68	Are management meetings regularly scheduled?	C
Q69	Are Board meetings regularly scheduled?	C
Q70	Is management included in training programmes?	C
Q71	Is the Board included in training programmes?	C
Q72	Do you have the Investor in People award?	C
Q73	Are there plans to enter new markets?	C
Q74	Are there plans to re-locate?	C
Q75	Are there plans to expand current operation?	C
Q76	Do you have a preferred supplier list?	C
Q77	Networking opportunities?	C
Q78	Are there product/service design & development systems?	C
Total		C

HEALTH & SAFETY

Q79	Do you have a written Health & Safety policy?	C
Q80	Do you have a written Environmental Impact policy?	C
Q81	Is your Health & Safety officer qualified to NEBOSH?	C
Q82	Do you measure you accident rates?	C
Q83	Are your rest rooms, catering and toilets adequate?	C
Q84	Are risk assessment completed for each task?	C
Total		C

EQUAL OPPORTUNITIES

Q85	Do you have a written Equal Opportunities policy	C
Q86	Do you measure the recruitment and training statistics	C
Q87	Is there a nominated Equal Opportunities Officer	C
Q88	Is there a complaints procedure in place	C
Total		C

ESTATE MANAGEMENT

Q89	Do you have an estate management plan?	C
Q90	Does the estate require upgrade or repair?	C
Q91	Is there any dedicated staff for maintenance?	C
Q92	Do you have security access limited?	C
Q93	Is there a housekeeping policy?	C
Total		C

PROJECTS

Q94	Do you have written procedures for project management?	C
Q95	Do you have project management experience?	C
Q96	Do you measure the success of each project?	C
Total		C

INFORMATION, COMMUNICATIONS & TECHNOLOGIES

Q97	Do you have a written ICT policy?	C
Q98	Are you satisfied with your ICT?	C
Q99	Do you use e-mail?	C
Q100	Do you use ISDN?	C
Q101	Do you use technical software?	C
Q102	Do you use office software?	C
Q103	Are your staff adequately trained?	C
Q104	Is your ICT integrated through the business?	C
Q105	How often do you management your web site?	C
Q106	Amount of measured B2B trade?	C
Total		C

GRANTS

Q107	Have you ever been awarded grant aid?	C
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GRAND TOTAL C

PERCENTAGE C %

*Anything above a 60% should be deemed okay.

However, any answer with 1,2 or 3 response from questions

38-49,60-61,70-71,75,77,90-92,99 may require additional product