Qualified by EFQM

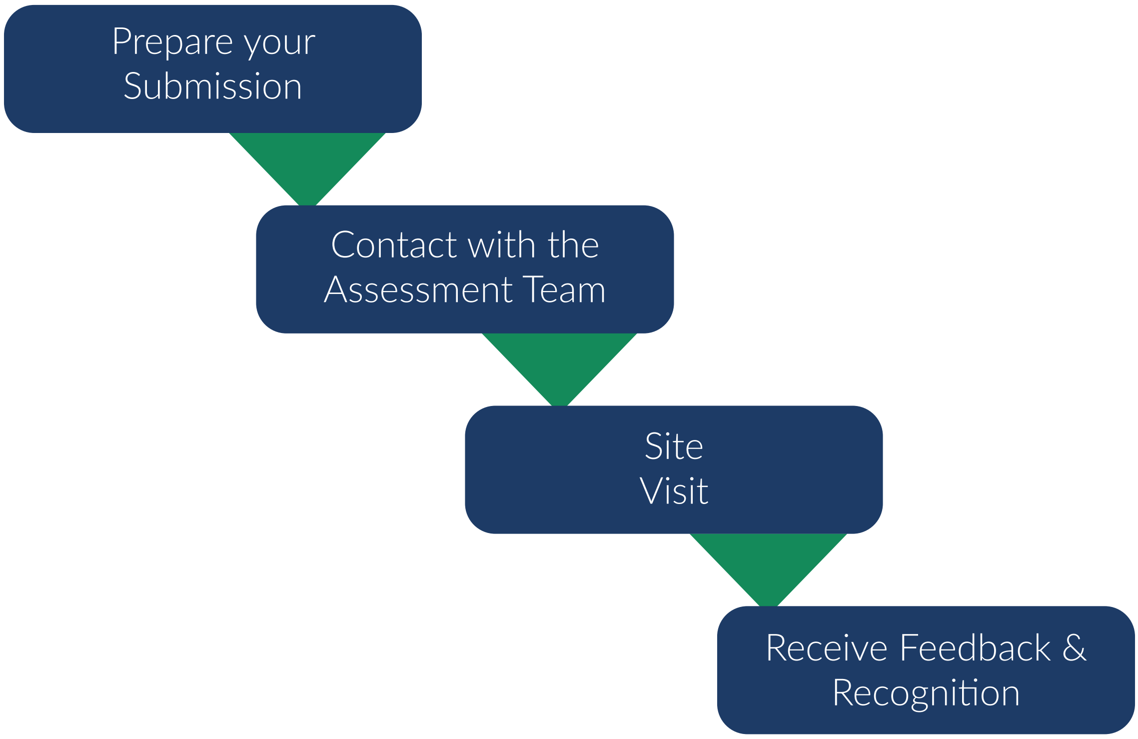
Who is the Qualified by EFQM for?

Any organisation or business unit can apply at any time, regardless of their location, size or sector.

Qualified by EFQM is targeted towards organisations who, not being so familiar with the EFQM Model, want to receive a quick analysis of their strategy, management practices and overall performance.

The Qualified by EFQM process overview

The Qualified by EFQM assessment can be organised any time of the year when it is more convenient for your organisation.



Phase 1: Prepare your submission

This is the moment where the decision to engage or not into the process is made. Preparing and discussing internally a first version of your project plan and an estimate of the associated cost and benefits will help you to take the decision.

Once you have decided to apply to the Qualified by EFQM, you need to send the Application Form signed and start preparing the submission document. You need to also inform EFQM on your preferred date for the site-visit.

- You need to submit your submission document around 6 weeks before the site-visit so that the team can prepare the assessment

Producing the submission document
The submission document is created in the EFQM AssessBase digital platform, using the EFQM Business Matrix tool. It is a very user-friendly platform that allows many people from your organisation contribute to the creation of the submission document. Please ask EFQM for access and more information about the AssessBase.

Once the site-visit date is fixed, EFQM carries out the Assessor selection process and selects two Assessors. Before officially confirming the team composition, EFQM will send you the names of the assessors so that you can check whether there is any conflict of interest between you and any of the assessors.

- For example, a conflict of interest could occur where an Assessor is personally involved with your organisation as a key customer or key supplier or has worked for your organisation in the past. EFQM will also check this with the assessors.

Once both the applicant and the assessors have confirmed there is no any conflict of interest the assessors sign code of conduct and confidentiality form and EFQM will put you in contact with the team.

Phase 2: Contact with Assessment Team – Site-Visit preparation

EFQM will introduce you to the Assessment Team by email. You can then already contact the team.

During this phase, the team will introduce themselves, and might ask you to provide additional information to complement or clarify some aspects of the submission document.

The preparation previous to the site-visit will be done remotely and the assessors will be working together through conference calls and emails.

This will be a period of on-going interactions in order to create together the best possible plan for the site visit:

- Agendas/plans/logistics
- Translation needs
- Data to be collated for the team on arrival
- Key contact co-ordinates
- Key deadlines
- etc.

You will probably also be in contact with EFQM during this time and please keep EFQM aware of any problem or issue.

Phase 3: Site-Visit

The site visit is normally conducted in 1 day (1.5 days for large organisations). During the visit, many employees at all levels in your organisation are interacting with the assessors (interviews, presentations, walkabouts…). Your organisation's performance will be assessed against the EFQM Model using the RADAR logic for assessing and scoring.

The site visit is carried out in a very open and constructive atmosphere, it is the moment of truth where you create impressions for the Assessors and supply them with tangible and intangible evidence.

- The assessor team arrives in the afternoon/evening of the day before the site-visit starts and prepares the opening of the assessment.

- The site visit starts with the Opening Meeting between the Assessment Team and your Senior Management Team. During this meeting, the Assessment Team will introduce themselves, explain the site visit agenda and share with you their expectations for the sitevisit. They will also ask you to introduce yourselves and present shortly your organisation and share your expectations for the week. This meeting is key to start the site-visit with an open and honest atmosphere.

- After the Opening Meeting, the Assessment Team will interview different people in your organisation to get more information about your organisation's performance. You will have discussed the agenda with the Team Leader in advance so please make sure the involved people are available for their interviews.

- After the interviews, the assessors will have a consensus meeting, score your organisation and prepare the Closing Meeting.

    – The team uses the EFQM Model and the RADAR to come to a consensus and agree analysis of your organisation, keeping the focus on your key strategic challenges and objectives.

- During the Closing Meeting, the Assessment Team will share their high-level impressions with you and will shortly show you some strengths and areas for improvement of your organisation around "Direction", "Execution" and "Results". Please note that the outcome of the assessment is not shared during the Closing Meeting. You will receive this information from EFQM shortly after the site-visit is over, together with the Feedback Report prepared by the Assessor team.

1-day Site-Visit agenda

	Assessor 1	Assessor 2
9:00 - 10:30	Opening Meeting Purpose, Vision & Strategy (Management Team)	
10:30 - 11:00	Break/Assessor consolidation	
11:00 - 12:00	Engaging Stakeholders	Organisation Culture & Leadership
12:00 - 13:00	Lunch Break	
13:00 - 14:00	Creating Sustainable Value	Driving Performance & Transformation
14:00 - 14:30	Break/Assessor consolidation	
14:30 - 15:30	Perception Results	Performance Results
15:30 - 16:30	Consolidation/Prepare Feedback	
16:30 - 17:00	Closing Meeting	

Hospitality Guidelines

We highly appreciate that applicants host the assessors as well as they can and that treat them with respect. This is also the way we expect the Assessment Team to behave.

Normal practice is to send someone to pick them up in the airport or give them clear indication on how to arrive to the hotel on the evening before the site-visit.

It is also common that you take the Assessment Team for dinner if the agenda allows that.

If it is part of your culture to offer courtesy gifts these should be of a small value. We want the applicant to treat the assessors according to normal business practices not as VIP.

Phase 4: Receive Feedback & Recognition

After the site visit, the Assessment Team finish the written Feedback Report and submit it to EFQM. EFQM will then proofread it checking it is consistent and that the score reflects what the team has found out.

If you have achieved the level to receive the recognition, we will send you a Congratulation email with:

- The outcome of the assessment
- The logos you can use for promotional use
- The certificate
- A link to an online satisfaction survey – please complete it as we use the comments to improve the process
- The Feedback Report that consists on:
    - Executive summary
    - Feedback at criteria level (7) with the strengths and opportunities for improvement of your organisation (performance assessed against the EFQM Model using the RADAR logic for assessing and scoring)

When the content of the feedback report is well understood and analysed, it is the time to start managing the change and work on continuous improvement programmes.

EFQM will communicate your achievement through our different communication channels.

Helpful Hints

Phase	Do	Don't
Site-Visit Preparation	Prepare site-visit in advance; be in regular contact with the assessment team	Don't wait until the very last moment to prepare the site-visit and arrange the agendas of all the people involved
Site-Visit Preparation	Brief your people about how an EFQM Assessment works and how the site-visit works	Don't expect them to be familiar with an EFQM Assessment if it is their first time
Site-Visit	Ensure you have relevant supporting materials available during the interviews; interviewing in the workplace means they can explain information during the interview	Don't print everything and leave it in the room for the Assessors to read; the assessors will ask for what they need to see during interviews
Site-Visit (Closing meeting)	Expect to receive high level findings about your organisation from the assessor team during the Closing meeting at the end of the site-visit	Don't expect to receive the score and detailed feedback

Other Useful Information

Qualified by EFQM fee

The Qualified by EFQM fee varies depending on the size and scope of the organisation and the relationship with EFQM (member or non-member). Please contact EFQM to know your participation fee.

Other associated costs

On top of the application fee, please bear in mind that the are some other costs associated to the assessment process:

- **Travel and accommodation of the Assessment Team for the site-visit:** both the travel and accommodation of the assessors during the site-visit need to be covered by your organisation. We don't have any specification about the category of the hotel but please make sure to put the two assessors together in the same hotel. For the travel, economy class is the standard for flights and other ways of transportation. For flights of over 6 hours, Business class is recommended.

- **Other:** printing of materials, translations (if needed) etc.

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