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## FEATURED ARTICLE

# A Tactical Approach to Retaining Clients in a COVID-19 World: Implementing a Service-Based Management System during a Global Pandemic



By Susan Gorveatte

## Introducing Service-Based Management Systems

The world is different; that much we know. As service-based organizations continue to work through the COVID-19 pandemic, their focus is clear—thrive by maintaining and increasing customer service levels to ensure customer retention and growth. But with potentially reduced resources and economic leverage, how can this be done?

*Continued on page 2*

To save time and money while still providing the standard of service expected by their customers, many organizations are turning to a process-based approach for service delivery. This means implementing a controlled system of processes to ensure service levels can be delivered consistently despite the constantly changing environment. I refer to this as a service-based management system (SBMS), a set of interactive processes that work together to achieve a common goal: consistent quality customer service (QCS) delivery.

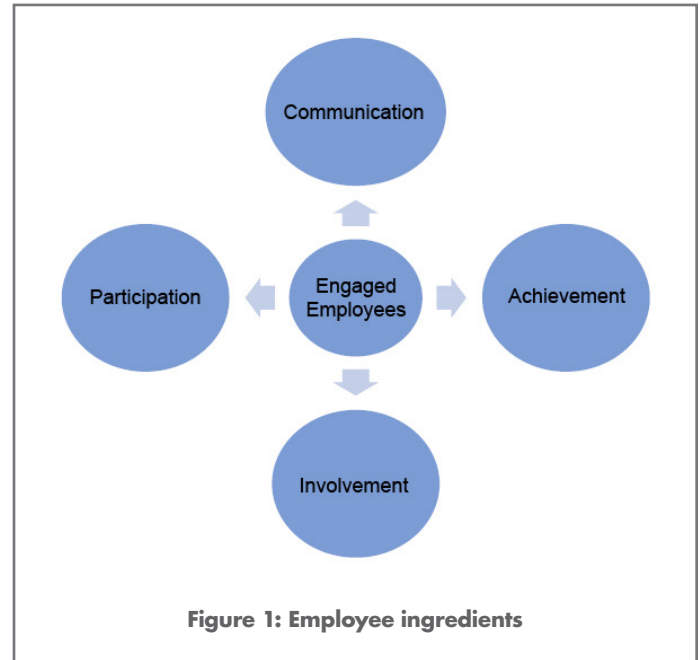
Using a process-based approach to quality customer service delivery is not new; in fact, there are over one million organizations in more than 170 countries that are certified to a global standard for quality, ISO 9001, published by the International Organization for Standardization<sup>1</sup>. This version of a service-based management system is a simplified version of a quality management system focusing specifically on service delivery. The concept of SBMS is attractive to small businesses in the service industry that would not otherwise need to implement a full quality management system.

The basic concept for an SBMS is based on the foundation of quality customer service: providing superior aid to any entity that requires information or assistance in a friendly, courteous, and helpful manner. In today's challenging global economy, excellent service can be a sharp competitive edge, helping organizations retain their customers and grow their business. Service excellence is the new standard, and organizations must get it right if they want to grow. The three main ingredients in an SBMS are:

- Employees
- Customers
- Organizational Processes

## Employees: Putting Your Own House in Order

To enjoy the highest standard of service superiority, and therefore retain and grow their customer base, organizations need motivated, engaged employees that care about quality customer service. Happy employees are productive employees.



**Figure 1: Employee ingredients**

Productive employees will satisfy the customer, who will bestow more business. Service-based organizations need to address the quality customer service issue at the root—its people. Four main employee ingredients are needed to blend the right amount of practical magic to create consistent quality customer service delivery. They are communication, achievement, involvement, and participation (see Figure 1).

### Communication

Communicate with all employees. Everyone should know what to do and how they should be doing it. Employees should know exactly what is expected of them through clear definition of their roles and responsibilities. Employees need to understand where their job fits into the organization and how their performance will be assessed and evaluated. It is important to ensure employees are aware of how their overall performance affects the organization, how their mistakes affect the organization, and how they will be developed and nurtured within the organization. It is also equally important to have timely reviews with honest feedback and to provide guidance to build involvement and participation (more on those shortly).

## Achievement

I believe most people wake up wanting to do a good job, and that most people have a built-in need to achieve. If employees are deprived of their need to succeed, they may “check out” and virtually disappear into their job descriptions. If organizations set targets, goals, and objectives for all relevant functions and then make them challenging but achievable at the personal level, employees will stretch to achieve them. Without targets, goals, and objectives, employees can be under-productive and therefore under-utilized; expect more, and employees will give more. To reinforce the positive cycle of achievement, it is on the organization to reward more. Do not underestimate recognition as part of achievement. Done right, a sincere extension of gratitude (and it does not have to be expensive or cost anything at all) will provide a sense of achievement and build trust with the employee so the cycle can continue.

## Involvement

Once employees understand how they fit into the organization and are sincerely appreciated for their efforts, it is important to keep that positive traction moving forward. Communicate ownership. When employees are engaged to “own” their roles and responsibilities, they care. When employees care, quality customer service levels increase. Involve the employees at all levels of the organization. Ask employees to contribute to stand up meetings or dial in on a Zoom call; anything that continues to engage the employee with the organization. Doing this provides added value to employees by making them feel more connected. Consider corporate “bling” or “swag” and other company-logoed items. These help employees feel ownership in the organization. During a time when an organization may not see employees regularly (in the case of remote workers) or when geography prevents employees from being together, it is more important than ever to involve them so their contributions to the organization remain positive and they stay engaged with the customers. The customers benefit, as does the organization.

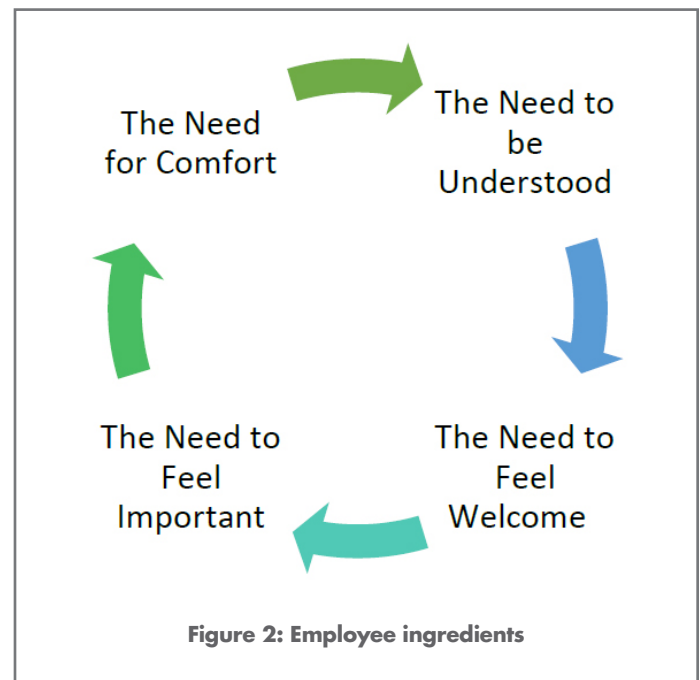
## Participation

When utilized well, employees become a source of untapped knowledge and creativity. Continue to engage employees by encouraging participation in decisions that impact them. Ask

for opinions and continue to develop their sense of ownership. Communicate to employees, “We need and want your ideas.” Offer training, mentoring, and other outlets or activities to encourage ongoing employee participation. Reward, recognize, and praise creativity and positive behavior within the organization, thereby tying all of the ingredients together to blend the right amount of practical magic for quality customer service success.

## Customers: Understanding Your Customers’ Basic Needs

Now that organizations have looked inward to find the right blend of ingredients to engage employees, it is important to look outward towards the customer. Service organizations have a bit of a unique challenge. In the words of the late Bob Farrell, ice cream parlor entrepreneur turned motivational speaker, “Our business is not what we sell, it’s who we serve.”<sup>2</sup> Understanding customers’ basic needs and having the resources needed to meet



those needs is a moving target, always changing, more so than ever during COVID-19. These needs are shown in Figure 2.

## The Need to be Understood

When customers select a service, they need to feel they are communicating effectively with the organization. This means the messages sent by the customer should be interpreted correctly, which seems so straightforward. However, emotions, body language, tone, technology, or even language barriers can get in the way of proper understanding. Clarity is key for customers. Let customers know that their needs are being understood by repeating them back, whether a phone call, a written statement, a website order confirmation page, or any other medium to avoid misunderstandings “down the road.”

## The Need to Feel Welcome

If customers doing business with an organization are made to feel like outsiders, they will not return. Customers need to feel the employees are genuinely happy to “see” them (either in person or virtually) and that their business is important. Look happy. Welcome the customers and make them feel like they are part of the organization, because they are! For instance, if selling a club membership, welcome new members at the initial sign-up and each renewal period. A simple “shout-out” or a greeting in an email may be all it takes to let customers always know they are welcome.

## The Need to Feel Important

Anything an organization can do to make customers feel important or special is a step in the right direction: eye contact, priority codes, membership levels, limited or special access to products, privileges, or services. Make a big deal of the customers, whether it is in an email, speaking to them on the phone, or over a video call. Let customers know that they are appreciated, so they feel important and valued.

## The Need for Comfort

Customers need physical comfort: a place to wait (e.g., a waiting room on a Zoom call), to rest (e.g., an order review page on a website), to talk (in person or through video call), and a place

to do business (physical or virtual). This also includes the need for psychological comfort, the assurance they will be taken care of properly, and the confidence their needs will be met. During COVID-19, this may be the most important need of all. Make the customer feel safe and worry-free.

## Organizational Processes: Process-Approach to Service Excellence

The final piece of a service-based management system is a process-approach. Processes are made up of inputs, activities, and outputs. A process is commonly defined as several reproducible, interacting activities that together convert an input into an output (see Figure 3).<sup>3</sup> These processes interact to deliver the result—a happy customer. The way an organization manages the interrelated processes to achieve its objectives is a management system.<sup>4</sup>



When identifying the processes within an organization, think about where that process came from (input) and where the process will lead (output). When identifying the steps or activities within the process, consider:

- with what (materials and equipment needed)
- how (support processes, procedures, and instructional methods needed)
- with whom (competence, skills, and training needed)
- what results (key metrics of the process needed)

Using a process-based approach, it is recommended that organizations document the relevant policies, procedures, and

flowcharts to their business process flow. For service-based organizations, this may include written documentation for the acceptance of orders, membership intake, the purchase of required materials, the order fulfillment process, and verification of customer satisfaction. The depth and complexity of the written documented information will depend on:

- the organization's operations
- the nature and scope of products or services offered
- the experience level of the employees (newer employees may need more guidance than veteran employees)

It is important for organizational management to involve the employees when documenting the required information; after all, they do the work every day, and they know the steps required to get the job done. These written policies, procedures, or flowcharts help ensure consistent service delivery to the customers regardless of who performs the task. The documented information removes the person from the process and ensures the job will be done consistently. Period. The intent here is to remove potential variance from the process. Once an organization allows for variance, it will invite risk, and risk will negatively impact the service delivery and/or bottom line of the organization. Consistency is the key here. Ensure all employees are aware of the available documented information and follow its spirit and intent consistently.

## Putting It All Together

Together, employees, customers, and the organization's process-based approach form a service-based quality management system, shown in Figure 4:

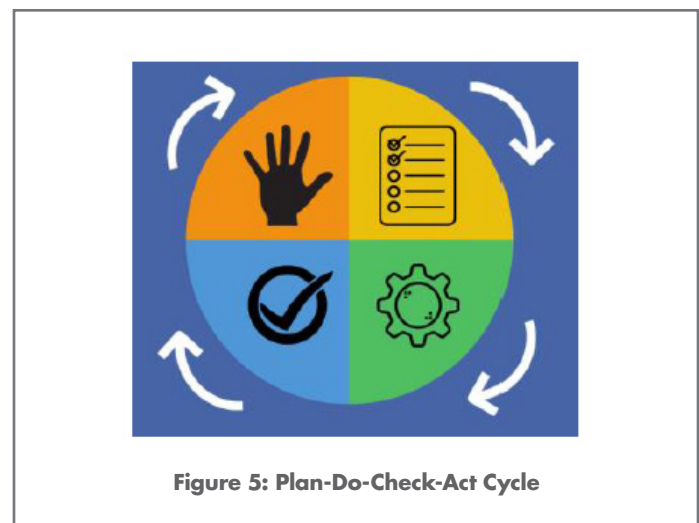
A service-based management system (see Figure 4) is integral to ensuring the continued success of an organization because it forces the organization to review, measure, monitor, analyze, and evaluate how it organically operates from customer inquiry through to happy customers. Organizations that implement an SBMS use the process-documented information and metrics to identify areas of improvement and to find new ways to do things faster, better, and cheaper. During this uncertain time, the ability



to assess and make decisions based on factual evidence is more critical than ever before.

When implementing a service-based management system, there are four key components (Figure 5):

- **PLAN** – Context, leadership & planning - What is your common purpose?
- **DO** – Resourcing & operations - What are your delivery systems?
- **CHECK** – Monitoring & measuring - What are your performance standards?
- **ACT** – Continuously Improve - What is your service recovery system?



## Plan

This is where the organization understands its overall context and the environment within which it operates. The organization should know who it is and what it stands for. It is important the organization has a clear vision of its strategic direction and uses that to guide its service-based management system and plan its service delivery process.

To summarize its context and environment effectively, the organization should establish a common purpose, business mantra, or credo. I like the classics: “Ladies and Gentlemen Serving Ladies and Gentlemen” from the Ritz Carlton Hotel<sup>5</sup> and Disney’s “We Create Happiness.”<sup>6</sup> It is the common purpose that unites the organization from top to bottom. The common purpose is what keeps the organization focused—like a policy statement of the SBMS. This can be a double-edged sword, however, as it is both a promise to the customer and a guarantee of sorts when all does not go as planned.

An organization’s common purpose will be unique. This is the starting platform that an organization will use to outline the processes that define the steps of how the business organically runs. From the common purpose, define the organizational processes and set targets, goals, and objectives for all relevant functions of the organization. Then plan the actions to meet the targets, goals, and objectives.

The planning stage is where the organization adopts a risk-based thinking approach to its service delivery process; it considers possible delivery gaps that can impact its ability to meet its common purpose and plans action to address the risks. It is important to remain one step ahead, always thinking of what can impact the service delivery process, and to be prepared for that. Only when the planning step is effectively managed should the organization move to the next stage.

## Do

This is where the organization takes the customer on a journey from inquiry to satisfaction. The journey is made up of touchpoints, which occur any time a customer interacts with the organization or its employees. This can be as simple as cars with logos and signs driving down the road, an email blast, FAQs on a website, or a telephone call. It can also be completing a membership application over a Zoom call to ensure the correct information is collected from the customer at the time of

application. Anything that makes an impression. Most touchpoints take place beyond the line management’s sight. Therefore, it is important to have engaged employees that can effectively and consistently follow the defined processes, policies, procedures, and flowcharts in a positive way to ensure consistent quality customer service delivery. Every time customers interact with the organization, they make an assessment. Collectively, all those assessments form the customer’s image of the organization, positive or otherwise.

At this stage of the SBMS, all support (non-customer facing) and core (customer facing) processes are working together. Support processes indirectly impact customer service delivery and processes such as IT, administration, training, and HR. Core processes directly impact customer service delivery, such as sales, membership Intake, and renewals. If all core and supporting processes work towards the organization’s defined common purpose, the result should be a satisfied customer and an overall positive experience, otherwise referred to as a “shining moment of truth.” When the support and core processes do not work well together—or conflict with the common purpose—the result could be an unsatisfied customer, or a “dull moment of truth.”

Both shining and dull moments impact the organization’s overall performance and customer perception and affect its ability to achieve its targets, goals, and objectives. Are customers leaving the transaction with a positive impression that will motivate them to return? Or are they leaving with an indifferent impression?

Think about it. If it is *right*, nothing else matters. If it is *wrong*, nothing else matters. A bad customer experience at any touchpoint in the customer lifecycle can ruin the relationship. In addition to ensuring the right processes are followed, and the appropriate skills are demonstrated, organizations need to be sure they are being exemplified consistently. Remember to eliminate the chance for variance and risk. Get it right the first time, every time.

## Check

Organizations need to be curious. How well did the employee listen to the customer? What did they need? Was their need met? In other words, get a PhD in “customertology.”

Consider the secret shopper or undercover boss idea. Perform a self-assessment to get a 360-degree view of the customer experience. Evaluate and audit the customer service process



regularly. Ask employees and customers about their experience during the order fulfillment processes in the Do phase. Solicit feedback from customers and employees early and often. Use the feedback process as an optimization tool. If changes are required, be prepared to report to top management or the leadership team with the performance metric data in hand.

Monitor the targets, goals, objectives, and related planned actions set in the Plan stage. Measure, analyze, and evaluate the factual evidence needed to track the organization's performance against these metrics, and use the data collected to identify trends and areas of improvement. Do not just look at the data; use it and be prepared to act on its information.

Think of the customers' four basic needs. If the factual evidence indicates a growing trend that customers may be unsatisfied with the value of the service provided, then this needs to be addressed by top management in the Act stage.

## Act

The final phase is service recovery and improvement. Unfortunately, organizations cannot get it right all the time. Mistakes happen. Challenges are presented to the organization, and this is where immediate and swift service recovery can make or break the customer experience. In my work with organizations, I discovered the actual incident or event can be easily forgiven if the service recovery is effective. Customers are willing to forgive an organization for poor performance if they can effectively turn around and provide great service recovery. This is critical when considering customer retention and growth. Turning "*dull moments*" into "*shining moments*" can mean the difference between losing or retaining a customer.

Problems are not always black and white. Although understanding the problem needs to be immediate, a decision does not need to be immediate if the customer is aware the organization is working on a solution. Understand where the failure occurred, identify containment action to bring the situation under control, and then identify the root cause of the problem. Why did this failure occur and where was the variance? Once the root cause has been identified, make a clear plan to correct the failure that includes training and empowering staff to ensure everyone is aware of the planned corrective action so that it never happens again.

Finally, follow up over time to ensure the action taken was effective. Ensure the issue stays corrected and that the customer is satisfied with the service recovery. During this follow up

stage, make customers feel understood, welcome to return, and important. Most of all, ensure they are comfortable with the service recovery and their overall experience with the organization.

## Summary

A service-based management system is about employees, customers, and processes. Put them all together, and the result is a continual improvement system that can help grow the organization, even during the constantly-changing environment of a global pandemic. Organizations use SBMSs to ensure customer retention, higher satisfaction levels, and overall organizational growth. To create a parody of an all-time favorite movie, Ferris Bueller's Day Off, "In today's world, business moves pretty fast. If you don't stop and PLAN, DO, CHECK, ACT once in a while, you could miss it."

## Biography

Susan Gorveatte, President of Gorveatte Consulting Inc., is an ISO 9001 Auditor, Trainer, and Quality Coach. She has worked in quality management for more than twenty-five years. Susan has taught over 1000 students in quality management and has performed more audits than she can count. She is active with ASQ, holding the positions of Secretary of the Audit Division, Chair of the Content Management Committee for Training and Development for the Quality Management Division and is an International Member of the Technical Programming Committee for World Conference on Quality and Improvement. She can be reached at [susan@gorveatteconsulting.com](mailto:susan@gorveatteconsulting.com).

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## Chair's Message | Denis Devos

Hello Quality Management Division members! It's a privilege to introduce myself to you as your new chair. My name is Denis Devos, and I have been a member of ASQ since 1996. I began volunteering with ASQ as the chair of our local section and became more active in QMD when I was appointed as the Vice Chair Global in 2012. Since that time, I have been active with the QMD council, and now I have the privilege of serving you as the chair of this exciting and active division.

I want to thank our past chair, Peggy Milz, for mentoring me and preparing me for this role. I hope that I'm able to continue providing you, our members, with the care and determined leadership that Peggy demonstrated so well over these past two years. I also want to welcome our chair-elect, Ellen Quinn, and I look forward to working closely with her to provide you with the best service and support possible.

I promise you that everything our QMD Executive Council does during my tenure will be member-focused. Everything we say and everything we do will put our members first. We're especially proud of the member benefits that have made us ASQ's largest division, including our thought-provoking webinars, monthly e-blast outreach, and quarterly journal publication, the Quality Management Forum. We hope that you take full advantage of everything that QMD has to offer and, by all means, reach out to any of us to contribute your input or give us your opinions and feedback.

We're very excited to be back in person for our World Conference on Quality & Improvement (WQCI) in Anaheim, California, from May 15 to May 18, 2022. This year's conference will be a hybrid virtual and in-person experience. It will be the first opportunity we have had to be together since 2019, so I sincerely hope that many of you will be able to join us. For volunteer leaders like ourselves, meeting all of you at the World Conference is the highlight of our year and energizes us to keep working for the benefit of all our wonderful members.

The year 2022 promises to be a great one for ASQ, but only because of the involvement of all members. Please get involved. Get involved in QMD and any other divisions you are a member of. Get involved in your local section—the single most important benefit of ASQ membership is networking with other professionals like yourself. From new-to-quality members looking for a new career to those who have devoted a lifetime to quality, our active membership offers guidance and support for everyone, everywhere, and at all stages in their professional lives. Please consider becoming a volunteer with QMD and reach out to me or anyone else on the council to step forward and become a part of our fun and dynamic team.

We wish all of you well and look forward to hearing from you soon.



*Denis Devos,  
Chair, ASQ Quality  
Management Division*



## Editor's Notes | Sandy L. Furterer

Welcome to the Spring 2022 issue of QMF. Happy spring! We've almost made it through the winter; in fact, some of us are already there, depending upon where you live. We're moving into Spring Break at my university, giving the faculty and students a chance to catch their breath. I hope that each of you can take a few moments to spend with the QMD *Forum*. We have some great articles with interesting and applicable ideas that we can apply in our work and our professional lives. We have three featured articles in this issue. The first article, "A Tactical Approach to Retaining Clients in a COVID-19 World," by Susan Gorveatte provides insights into how to treat our customers better in service organizations to achieve consistent quality customer service (QCS) delivery. Our second article, "A Metaphor for the Society and Active Citizenship Model: The Apple Tree," by Yves Van Nuland and Grace L. Duffy provides an apple tree metaphor to describe their groundbreaking work of the Society and Active Citizenship Model, originally published here in the QMF. The third article, "A New Tool Making Meetings More Efficient," also by Van Nuland and Duffy, provides ideas to make meetings—where we spend so much of our workdays—more efficient and perhaps more enjoyable.

We have our new QMD chair, Denis DeVos' inaugural Chair's Message. Denis provides his insights on the state of our Quality Management Division.

We have a special feature in this issue, "Book Clubs: Of Books and Penguins," by W. Frazier Pruitt, that talks about the impact reading with an eye on critical thinking has had on his life and provides information on how you can join ASQ's NextGen Book Club.

We have a book review by Dan Zrymiak, originally published in the *Quality Management Journal*, which tells us about *Customer Experience Excellence through a Quality Management System*, by Alka Jarvis, Luis Morales, and Ulka Ranadive. This book provides an overview of how customer experience (CX) measures, impacts, and life cycles can be integrated within the framework of a quality management system (QMS) within an organization. And last, but not least, we are blessed with a Coach's Corner, "Navigating a Successful Path in Life," by J.R. McGee, who once again provides powerful and thought-provoking insights for us to apply to our lives and our careers.

As always, please feel free to provide feedback on this issue of the *Forum*, as well as any ideas for enhancing QMD publications for our division. I can be reached at [sfurterer1@udayton.edu](mailto:sfurterer1@udayton.edu).



*Sandy L. Furterer, PhD, MBA, is an associate professor in the Engineering Management, Systems, and Technology Department at the University of Dayton. She holds ASQ certifications, which include the ASQ Certified Quality Manager / Organizational Excellence, Certified Quality Engineer, and the Certified Six Sigma Black Belt, and is an ASQ Fellow. She is a Certified Master Black Belt by the Harrington Institute, Inc. Furterer resides in her home state of Ohio, near Dayton, with her husband Dan, three children, and their pets, Demi, their Beagle-Jack Russell Terrier rescue dog; the slightly crazy Lily, their hound-lab rescue dog; and an orange tabby cat rescue, Louis. There is also a new friend for Louis, Bella, a rescue cat, and her grand kittens, Thalia, Sasha and Anya, plus the memories of Katia and Gypsy whom we lost recently. Contact Sandy at [sfurterer1@udayton.edu](mailto:sfurterer1@udayton.edu).*

# A Metaphor for the Society and Active Citizenship Model: The Apple Tree

By Yves Van Nuland and Grace L. Duffy

A metaphor is a tool to illustrate the different components of the Society and Active Citizenship Model (SAC-Model, see Figure 1). The model is an approach to more effectively addressing societal needs while using available country resources optimally. For a full description of the model, refer to the paper<sup>1</sup> "A Government Process Model: How Well is Our Country Managed?" published in the ASQ *Quality Management Forum* (Fall 2021). We use an apple orchard for our metaphor.

There are basically two parties in a country that have a specific role to fulfill. On the one hand are privately owned companies, legal, medical, and financial professions, and the self-employed; and on the other hand are All Organizations of the Public Sector (AOPS<sup>2</sup>), which create a favorable environment for entrepreneurs. The AOPS creates, maintains, and monitors regulations. In addition, the AOPS also manages common interest activities such as health, education, and culture. The first group is the one that creates economic added value for the country. A well-managed country needs both groups. Neither is more important than the other.

In the metaphor of the apple tree, we use the farmer as an example of a privately-owned company that creates added value and the AOPS that are responsible for the management of the country. The assessment of a country is done by the application of the SAC-Model. The assessment of a single organization (company or individual AOPS) is done by excellence models such as MBA<sup>3</sup>, EFQM<sup>4</sup>, and CAF<sup>5</sup>. The assessment of a single management process that leads to a Best Practice<sup>6</sup> is done by the BEST-method. These three methods complement each other.



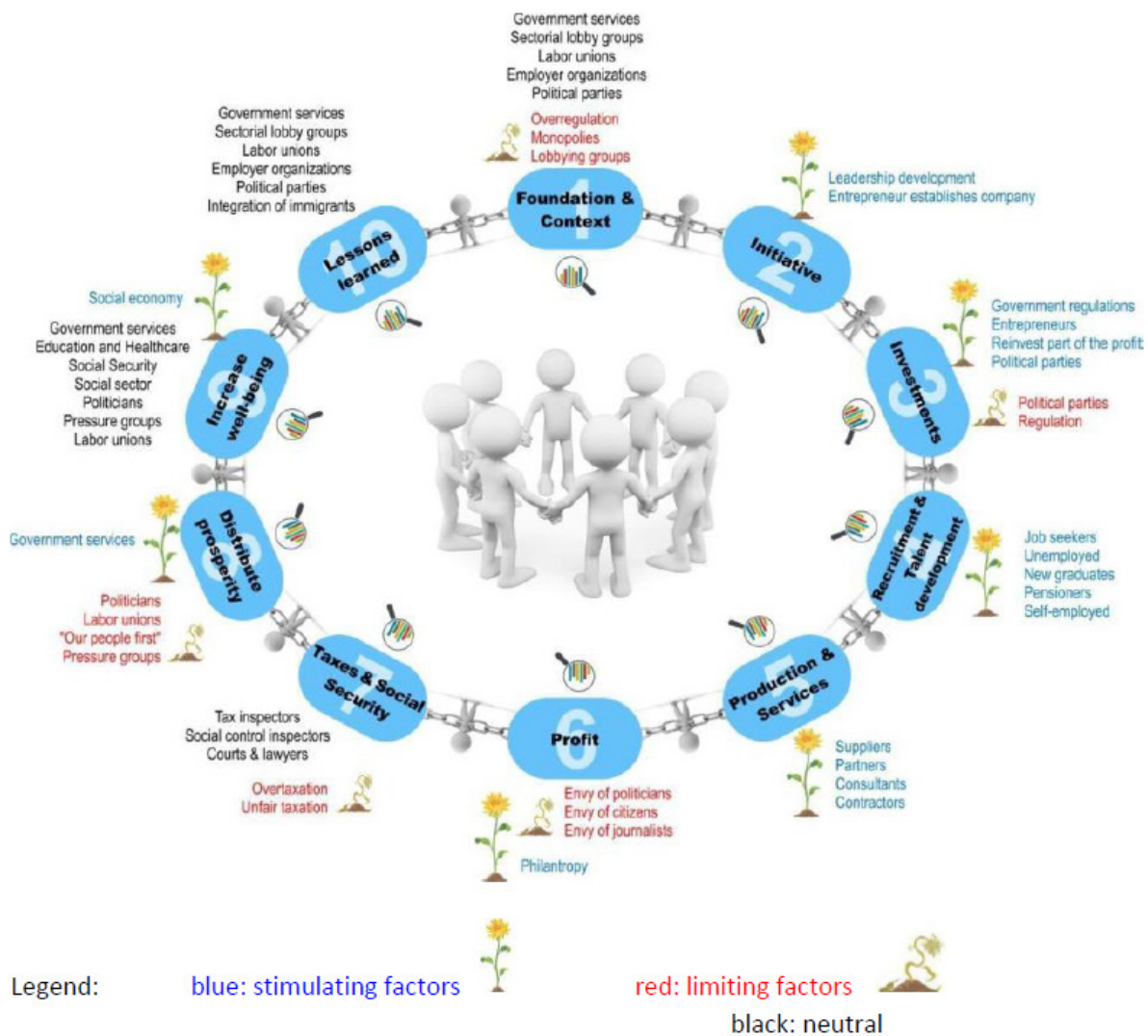
**Yves Van Nuland PhD**

After his studies for a PhD in chemistry at the University of Leuven (Belgium), Yves worked at the Belgian FDA. Next, he was laboratory and quality manager at PRB (chemical industry) and quality manager at UCB Chemicals in Brussels. As a self-employed consultant-trainer, he gives support to his customers on subjects such as excellence models (EFQM and MBA), business process management, KPIs, and company culture. He is coauthor and editor of *Excellent: A Guide for the Implementation of the EFQM Excellence Model and Validating a Best Practice*.



**Grace L. Duffy, MBA, LSSMBB**

Grace has over 45 years experience in successful business and process management in corporate, government, education, and healthcare. Grace uses her experience as President, CEO, and senior manager to help organizations improve. She has authored 15 texts and many articles. She is coauthor of the book *Validating a Best Practice*. She is a frequent speaker and trainer. Grace holds an MBA from Georgia State University. She is a LSS Master Black Belt, ASQ Fellow, and Distinguished Service Medalist.



**Figure 1 SAC-model: A cycle of 10 links**

Many KPIs contribute to the achievement of each link. Human aspects such as accountability, teamwork, and third-party feedback

The metaphor of the apple tree provides the reader with a better understanding of the relationship between the different links of the SAC-model and the elements implemented by each AOPS. The metaphor also demonstrates that cherry picking is not permitted. All links of the model in Figure 1 must be applied

systematically to achieve the desired outcome—i.e., excellent and sustainable results for all stakeholders in a country.

The SAC-model is applicable to all AOPS in the country since the SAC-model illustrates how well the AOPS are managed and how

they interact with all stakeholders in the country. When all AOPS apply the SAC-model effectively, it can be said that the country is well and efficiently managed.

We will now apply the ten links of the SAC-Model (Figure 1) for the apple farmer mentioned above, who represents a privately-owned company that creates economic value. The government limits the number of rules for the exploitation of an orchard. The apple farmer can get permits to run his business with a minimum of bureaucratic procedures. He uses sprays and fertilizers in a simple and legal way (link 1). He expands his business by investing in additional agricultural land and planting new apple trees (links 2 and 3). He may use seasonal workers. There are few legal restrictions (link 4). The operation of his business involves contacting beekeepers to pollinate the blossoms. The farmer applies additional sprays and fertilizers, and he picks the apples and brings the harvest to auction (link 5).

If market prices are favorable, the farmer will have a gross profit. He pays taxes on the profits (link 7). He also pays taxes and social security contributions on the workers' and his own wages (link 7). The country government where the apple orchard is located can use the tax revenues for the proper functioning and management of the country (link 8). Part of the tax money will be used for the development of education, culture, and health care (link 9). At the end of the year, the leaders of the AOPS and

farmer review what they have learned over the past year (mainly links 1, 7, 8, 9, and 10 for the AOPS and links 2, 3, 4, 5, 6 and 10 for the farmer) and where adjustments should be made for the new year (link 10).

The SAC-model describes what all AOPS in one country must do together to manage the country efficiently. However, every AOPS uses the appropriate toolbox to manage its organization individually (see Figure 2). It can also use excellence models such as MBA, EFQM, CAF, IoE<sup>7</sup>, or other management models.

Next, the elements that are used in the application of the SAC-model are explained for each AOPS, using the apple tree metaphor. We have explained the use of the metaphor of the apple farmer to illustrate the actions and results of the AOPS within a country.

Figure 2 explains the metaphor, but also lists 15 elements that must be realized by each AOPS. These 15 elements may be considered as 15 tools.

In the book *Why Nations Fail: The Origins of Power, Prosperity and Poverty*<sup>8</sup>, the authors Daron Acemoglu and James A. Robinson investigated many countries around the world, some going back two thousand years. They isolated 11 critical success factors (CSFs) for sustainable development (50 years or more) of

## 1. Outcome



An orchard contains hundreds of apple trees—each tree holds hundreds of apples.

### Outcome of the SAC-Model:

An orchard represents a country.

Each tree represents one AOPS.

The apples on the tree represent the results achieved by the AOPS.

The objective is to manage a country or a region in such a way that all AOPS produce excellent and sustainable results in the public interest.

## 2. Objective



### Goal

The farmer takes care of his orchard. He does everything necessary to manage it well. Each apple tree produces hundreds of apples a year.

#### **The objective of the SAC-Model:**

Each tree represents one AOPS. The results achieved for each AOPS must be balanced and in the interest of all stakeholders of the country.

## 3. Apple Tree Branch



All branches of the apple tree are cared for through pruning and spraying. All branches of the tree contribute to the total annual yield.

#### **Applicability to the SAC-Model:**

Each branch represents a department of justice, defense, health, education, agriculture, culture and sport, welfare, non-government organizations, social economy, taxation, infrastructure, and economy.

The apples (AOPS) from different AOPS contribute to country results independently of each other (example: defense and culture).

## 4. Finance



The farmer checks how best to spend his resources (fertilizers, sprays, collaborators, transport)

#### **Applicability to the SAC-Model:**

The leader of each AOPS transparently explains what income he or she receives and manages the expenditures of the AOPS.



## 5. Apple farmer



The farmer (leader) takes the initiative to plant, expand, and maintain the orchard and to harvest the apples on time.

### **Applicability to the SAC-Model Leadership:**

Everything starts with the leadership of an organization. The leader of an AOPS takes the initiative to actively develop the organization to meet the expectations of the stakeholders.

## 6. The 12 CSF



The roots of the apple tree are an essential part of the tree. The stronger the root system, the firmer the tree.

### **Applicability to the SAC-Model:**

Each main root represents one critical success factor (see list below).  
All 12 CSFs in an AOPS are sufficiently developed.  
It is difficult to achieve excellent results if one or more CSFs are missing.



## 7. Ten links



The ten links of the SAC model are the trunk of the apple tree. The nutrients run from the roots to the branches, and vice versa.

### **Applicability to the SAC-Model:**

All ten links of the model are systematically applied by all AOPS within a country.



## 8. Accountability



The farmer is responsible (accountable) for his apple trees and therefore takes care of them.

### **Applicability to the SAC-Model:**

The owner of each Key Performance Indicator (KPI) manages his KPIs and ensures that the planned and desired results are achieved. No excuses!



**9. SEE concept.**  
Self-Reliance  
Essence  
Economy



A tree can only grow optimally if three conditions are met at the same time: sufficient sunlight, fertilizers, and water.

**Applicability to the SAC-Model:**

Each AOPS systematically applies the SEE-principle. This is a tool to help set priorities and maintain the effectiveness of a decision or activity. To this end, the leaders of the AOPS check whether these three principles are systematically applied: **Self-reliance**, **Essence**, and **Economy**.

**10. Feedback**



The farmer receives advice from an agricultural expert to ensure a healthy orchard and to achieve a better harvest.

**Applicability to the SAC-Model:**

The owner of a KPI systematically receives feedback from third parties through the organization's website.

**11. Principles**



Self-reliance of the farmer.

Not only short-term yields but also long-term economic survival and general interest take precedence. The long-term view creates added value, focusing on the essentials and continuing to invest even in difficult times. The farmer is accountable for these results.

**Applicability to the SAC-Model:**

Not only short-term yields but also long-term general interest takes precedence, creating added value, focusing on the essentials, and continuing to invest even in difficult times. The AOPS is accountable.

**12. Optimal development**



A fruit tree requires maintenance, e.g., pruning and treatment against diseases.

**Applicability to the SAC-Model:**

The application of self-evaluation models such as MBA, EFQM, and CAF contributes to the optimal development of every AOPS.




<p>13. <b>Results</b></p> 	<p>Harvest of apples Once all the previous steps have been properly carried out, the farmer can harvest his apples. The result: a large harvest of beautiful and tasty apples.</p> <p><b>Applicability to the SAC-Model:</b> Each AOPS (apple in the metaphor) delivers excellent and sustainable results for all its stakeholders.</p>
<p>14. <b>Orchard harvest</b></p> 	<p>A farmer goes for a total harvest, namely from the entire orchard.</p> <p><b>Applicability to the SAC-Model:</b> A country will only deliver optimal, excellent, and sustainable results if all AOPS organizations in the country make positive contributions.</p>
<p>15. <b>Ultimate proof</b></p> 	<p>The ultimate test (outcome): tasting and eating the apple.</p> <p><b>Applicability to the SAC-Model:</b> the outcome. <b>The ultimate test:</b> excellent and sustainable results for the country. Illustrated in this example (picture) for one stakeholder.</p>

Figure 2: The Apple tree metaphor

1. Legal certainty (including separation of powers)
2. Property rights (land and house ownership, money, savings, and shared ownership)
3. Democracy, pluralism, and freedom of political expression
4. Education
5. Innovation and creative destruction
6. Globalization and free trade (including free market and individual freedom of choice)
7. Inclusive political institutions (versus extractive institutions)
8. Integrity versus fraud, corruption.
9. Infrastructure (transport such as roads, railways, ports and airports, education, telecom, energy supply, water supply, sewage, water treatment)
10. Accountability of the leaders
11. Human rights and freedom of expression
12. Remuneration policy

**Figure 3: 12 Critical success factors**

Notice that the authors added one more CSF from personal experience: remuneration policy.

a country or region (see Figure 3). They discovered that inclusive institutions, those that seek to serve their citizens rather than amass wealth at the top, have certain factors in common. The absence of one or more of these factors means that a country will not develop in a sustainable way.

The SAC-model includes 15 elements in Figure 2 that support the ten links of Figure 1. Management of a country means that the 15 elements of the SAC-model are managed, i.e., planned, implemented, and improved. Figure 2 provides a more detailed description of these 15 elements through an apple tree metaphor: (1) objectives of the organization; (2) alignment of the KPIs and results; (3) financial management; (4) role of leadership; (5) application of the 12 CSF (Critical Success Factors) by each AOPS; (6) all ten links of the SAC model applied within a country; (7) accountability; (8) SEE-concept; (9) feedback; (10) principles; (11) optimal development; (12) results; (13) optimal, excellent and sustainable results; (14) orchard harvest; and finally (15) the desired outcome for the country.

The apple tree metaphor presentation helps you recall the relationship between the multiple aspects of healthy and holistic country management. Details of the 15 elements will be described in future papers.

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# A New Tool for Making Meetings More Efficient

By Yves Van Nuland and Grace L. Duffy

## Abstract

We have all experienced the difficulty of leading efficient meetings. Classic team meeting rules or key performance indicators (KPIs) are not enough. Effective use of KPIs can greatly improve results, while organizational culture can have a negative impact on classic meeting protocols and outcomes. A new, pragmatic tool, 2"-8" (2 minutes - 8 minutes rule), facilitates a ten-minute decision-making cycle. Respect for team members' thinking styles (culture) also plays a decisive role in meeting efficiency. The combination of both factors, the 2"- 8" rule and organizational culture, can lead to exceptional results

## Characteristics of Meetings

In our function as consultants, we often observe the following meeting characteristics:

- Participants explain their actions in detail
- Participants try to prove that it is not their fault that an objective was not achieved
- The group tries to solve a problem during the meeting
- Multiple people speak at the same time
- There are no clear objectives for the meeting

Although this list is not complete, it illustrates well how meetings can be unproductive. In addition, meetings are often lengthy and cumbersome. Participants are not motivated to attend inefficient meetings. What can



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After his studies for a PhD in chemistry at the University of Leuven (Belgium), Yves worked at the Belgian FDA. Next, he was laboratory and quality manager at PRB (chemical industry) and quality manager at UCB Chemicals in Brussels. As a self-employed consultant-trainer, he gives support to his customers on subjects such as excellence models (EFQM and MBA), business process management, KPIs, and company culture. He is coauthor and editor of *Excellent: A Guide for the Implementation of the EFQM Excellence Model and Validating a Best Practice*.



### Grace L. Duffy, MBA, LSSMBB

Grace has over 45 years experience in successful business and process management in corporate, government, education, and healthcare. Grace uses her experience as President, CEO, and senior manager to help organizations improve. She has authored 15 texts and many articles. She is coauthor of the book *Validating a Best Practice*. She is a frequent speaker and trainer. Grace holds an MBA from Georgia State University. She is a LSS Master Black Belt, ASQ Fellow, and Distinguished Service Medalist.

be done differently to overcome such difficulties? What can be done to energize people? What can be done so that the meeting will deliver better results? If classical meeting rules to avoid the above time wasters are consistently applied, you will have better meetings. This paper outlines an approach to conducting meetings that will make them more efficient.

## Information or Decision Meeting

There is a difference between an information meeting and a decision meeting. While people need to be informed, there are many ways to provide information (e-mails, reports, intranet, meetings, informal contacts). In an information meeting, the chair of the meeting communicates information, and the participants can react and ask for clarification. The length and frequency of an information meeting depends on participant needs. However, we have observed that in organizations with little or no focus on objectives and results, people need frequent information meetings, which can burn up hours of valuable time because this type of meeting is rarely efficient. Organizations that do not focus sufficiently on objectives and results have difficulty achieving excellent results.

Leaders need decision meetings because they are accountable for achieving results. These results are aligned with the strategic and operational objectives of the organization's business plan. Besides the achievement of these results, there are also operational results that are linked to core organizational processes. In these cases, the leaders work with result KPIs<sup>1</sup>. In other words, a decision meeting is a meeting where leaders work with their KPIs. In organizations that run decision meetings, there is a high focus on results.

## New Tool: 2"– 8" Rule

We have shared nothing new so far. But the main questions are: How can we make meetings more productive? What can we do to have shorter, more effective meetings? What conditions need to be present to energize participants and obtain desired results?

We mentioned classic meeting rules earlier. Having an agenda, refraining from fault-finding and extraneous problem-solving are

all excellent practices. Driving efficiency through KPIs keeps the meeting focused on desired results. Each task or process must be assigned to an accountable individual who sets leading indicators to monitor progress. The meeting leader gives each KPI owner a short time on the agenda to share progress and challenges.

The KPI owners briefly explain what they expect to achieve during the meeting. They take two minutes, i.e., 120 seconds, maximum, to explain what they did during the last week, the results achieved so far (perhaps showing a graph about results), and how their objective is aligned with higher objectives. Finally, they present an action plan, i.e., what must be completed in the coming weeks. There are two possible proposals: (1) a concrete action plan for the coming week/month or (2) the owner's challenge with how to make progress. If the KPI owners need support, they simply ask team members: "I don't know what to do; can you help me formulate a possible action plan?"

The team members then have eight minutes to discuss and improve the proposal or develop a new high-level action plan. At the conclusion, the team reaches a consensus on the existing or modified action plan. The whole discussion takes fewer than ten minutes.

Consensus is not a compromise, nor is it the idea of one person that must be accepted by the team. Neither is the majority rule applicable. Consensus means that everyone contributes to a constructive debate. Every team member adds his or her ideas and experiences to the discussion. The final proposal is the reflection of the whole team. Every team member can live with the final proposal and has a positive view of the result.

Application of the 2"– 8" tool becomes easier when a standardized KPI<sup>2</sup> is used. The KPI owner makes a clear and detailed description of what needs to be achieved through the KPI. This allows the KPI owner not only to prepare better for the meeting but also to explain what she or he wants to achieve during the meeting.

One pitfall in this approach might be if the KPI owner does not have a solution for the KPI and starts to explain in detail everything that has already been done. Such an explanation will not have a positive outcome because it will almost certainly

take much more than two minutes. Usually, it will take 10 to 15 minutes, or even more. The team loses focus, and the meeting ends with no conclusion and no agreement about decisions.

Why does the simple 2"– 8" tool work so well? There are three reasons. First, the two-minute introduction allows the KPI owner to communicate with all team members, i.e., to create rapport with the team. The owner explains clearly what he or she wants to discuss. Second, the discussion is limited to a small number of items. Through this focus, it becomes clear to the team members what the owner does *not* want to discuss. And finally, there is better focus within the team, i.e., everyone knows what kind of action plan the team will decide on within the ten minutes. Obviously, the 2"– 8" tool only works if the KPI owner is well-prepared for the meeting.

## Organizational Culture

Not everyone is aware of the impact of organizational culture<sup>3</sup> on personal motivation and satisfaction and on the achievement of results.

We wish to share some examples of statements reflecting two different meeting styles (see Table 1). These two approaches exhibit different ways team members behave. The output achieved in these two types of meetings can be very different (see Table 2).

People working in a defensive company culture can use a constructive thinking style by saying what they plan to do in the coming week or month instead of explaining the encountered difficulties.

Think about what kind of decisions you'll see in both situations. Table 2 gives some possible decisions that teams using these two styles might take.

The examples in Tables 1 and 2 are certainly not complete. However, these will give the reader an idea of the contrast between the two thinking styles. In a defensive mindset, people will talk about past events 80% or even 90% of the time. With a constructive mindset, people speak about their plans and the

(near) future 80% of the time. In the first case, meetings can be lengthy (two hours and more), energy-consuming, and ineffective. In the second case, team members need only ten minutes per KPI, which keeps meetings shorter (approximately one hour), energizes participants, and encourages enthusiasm. The more efficient format provides the same reality but a completely different outcome! Think about it the next time you participate in a cumbersome and ineffective meeting. Applying the 2"– 8" rule can help you spontaneously use a more constructive thinking style

## Example of Application of the 2"– 8" Rule

One of the authors recently met with a client preparing for an on-site customer visit. The author had previously helped the client prioritize process, measurement, and documentation improvements critical for the customer visit. A list of 21 action items had been identified. The author met again with the client for a review of resolution activities. The department heads (Chief Operating Officer, Chief Technical Officer, Chief Engineer, and Production Manager) each took fewer than two minutes to describe the status and results of their action items. When the speaker identified a barrier to resolution, the whole team—including the company owner—spent no longer than eight minutes discussing and gaining consensus on the required next steps. Responsibilities were recorded, and accountability was accepted. What was planned to be a two-hour working session was completed in less than an hour-and-a-half.

## A Hint for Managing Energizing Meetings

How can you change a cumbersome meeting into an energizing meeting within 30 seconds? Ask the people around the table: "What do you want to achieve next month?" Suddenly everyone will think about "What to do in the coming weeks?" and "What is feasible?" We use this technique with our teams, and it works! In the defensive thinking style, people hold an information meeting, while in the constructive thinking style, people hold a decision meeting and are process and result-oriented.



**Table 1: Contrast of statements from two different thinking styles**

Looking back: Defensive thinking style	Looking back: Constructive thinking style
Explain what the problem is.	I put the following proposal on the table.
Are you sure that this is all the information we need?	I suggest this action plan with a clear "Who does what, and when."
I don't understand why it happened.	In preparation for the meeting, we found that the cause of the problem is ... and the solution for it is ... Therefore, my proposal for an action plan is ...
Let's try to solve the problem now in this meeting.	I examined the problem yesterday and my proposal for a solution is ... Can you agree to implement it?
Can you give me more information?	If we execute this action plan, we'll get the following result by next month ...
I am still not clear. Can you say it again?	As you can see in the graph ... there is already a positive trend.
This is not my responsibility; my colleague Tom can do that.	Can we all agree on this proposal?
My feelings tell me that this is not a good idea.	That is a good idea you have submitted to us.
Once again, this is a stupid proposal from the other department.	That is a new and worthwhile idea to investigate. The objective is not clear.
The objective is not clear.	As you can see in our KPI under the heading "What do I want to achieve? we plan to do the following ...
We can't do that because ...	We can solve that problem through ...
That is too difficult.	We can overcome the difficulties by taking the following precautions ...
We have not examined every detail; therefore, we need more time.	What do you think we can do by next week?
Yes, we can do that, but I have a better idea.	Interesting idea, what do the other team members think about it?
Which problems do we have?	What kind of solutions do you have? What kind of results can we expect to obtain?
Everyone tries to convince the others.	Listen with empathy to the ideas of the other team members.
Problems are described and discussed.	Possibilities and opportunities are discussed.
Team members explain in detail what they have done.	Every team member achieves at least one consensus decision (action plan) for his KPI by the end of the meeting.

**Table 2: Two types of decisions**

Looking back Defensive thinking style	Looking forward Constructive thinking style
OK, perhaps we can do that.	OK, we agree on this decision and plan. (Who will do what and when.)
We need another meeting so we can have a more detailed discussion.	We conclude that the consensus decision will be executed, i.e., ...
We'll do that because our boss wants us to.	How much will this decision contribute to the planned objective?
Let us look for a compromise.	Let us make a consensus decision.
Decisions are vague.	Decisions are specific and smart.
We have so many reasons to postpone our decision.	We are clear about what we want to achieve. We can decide in this meeting.
We try to do everything at once.	We decide things one by one. Make progress by executing a step-by-step plan.
Subjects of participants are discussed without focus.	Decisions are aligned with the priorities and strategic objectives.

## Conclusion

Fortunately, many team members say that they like the constructive style, that it gives them energy, and are highly satisfied with the results. However, the authors often see examples of the opposite practice. You'll be successful if you prepare your meeting well, update your KPIs, encourage constructive thinking during the meeting, limit the introduction of your KPI to only two minutes, work with a team spirit and, finally, reach a consensus of the team on a concrete action plan (who does what and when). This working method results in shorter meetings. A team of five people can hold a meeting in less than one hour and achieve at least five smart decisions.

## References

1. Results KPI: this is a traditional KPI. The owner of this KPI monitors a process leading to a quantitative result (Achievement of an objective).  
Activity KPI: This is not a real KPI; this is a "qualitative KPI." It is a follow-up of a series of activities. This is typical for projects. Once the goal of the activity is achieved, the KPI owner assesses success with a results KPI.
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# Book Clubs: Of Books and Penguins

By W. Frazier Pruitt

*I cannot remember the books I've read any more than the meals I have eaten; even so, they have made me.*

- Ralph Waldo Emerson

In the quality director's office, there lay a book with a penguin on the cover. Most times there was a book lying around that office, not on a shelf like a trophy but on the desk, ready at a moment's notice. I am not sure if the whole executive leadership team had been reading this book or if he had picked it on his own, but it had caught my eye.

Being a young professional in my first engineering position, I was eager to make a connection and learn everything important that was not covered in the CQE BoK. I went to the library to find the book with the penguin on the cover and devoured it over the next few evenings. Lessons from that experience are still with me today.

Looking back, I am not sure the particular book matters, but I often share two meaningful books (although perhaps not paramount examples). The two examples are Understanding Michael Porter by Joan Magretta and Leading Change by John Kotter. The second is the book with the penguin on the cover.

In the following weeks, the quality director, whom I now consider a mentor, and I talked about many things in relation to books and our work. Topics ranged from how Kotter's steps may have helped in the past to how we might use them in the future, even at times challenging the apparent luxury of enough time for all eight tedious steps. Porter's theme of strategy challenged the supremacy of Japanese production systems and stretched the bounds of quality functions. These can be heady conversations for a young



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engineer, and I am certain that I did not do them justice, but many practical things came from them.

By thinking critically about change, I started to internalize what drives human behavior and the factors involved in changing human behavior. This basic understanding of human behavior, however limited, has influenced my work on a daily basis. In fact, it may be a contributing factor to entering into supervision, a role I now very much enjoy, not least because I get to be the mentor. It gives me great satisfaction just striving to inspire and empower the next generation.

Similarly, the critical discussions and thoughts on the topics of corporate strategy stirred by Porter eventually shaped how I strive to view quality as more than a department. Those conversations were the seed that eventually led me to enroll in an MBA program, something I would have never fathomed as a young engineer. Today those skills, fostered some time ago, help me interface with all different levels of the organization and drive quality throughout the organization I shared here two very particular books and how they influenced me in a very particular way, but I don't think that is the point. These skills and perspectives have served me well, but my journey is not your journey. These examples are only two of many books I have read, distinguished here only because they are the ones I first remember. Your stories will be different. You will take away and remember different things in the end. It matters little what you start

reading—and you do not need a great mentor. What you do need is someone to push you from passive reading to critical thinking. Someone to challenge you, someone to provoke you, and not just in a theoretical sense but in relation to real experiences. You too may one day reminisce about books and conversations that quite unexpectedly had direct bearings on your life, but first you need to read and discuss critically.

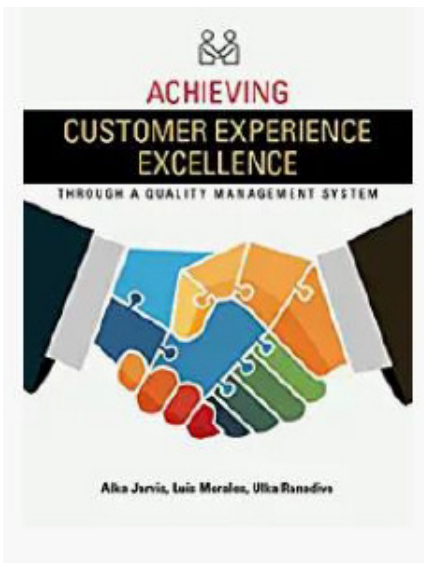
## New in the Community: ASQ's NextGen Book Club

We have all been influenced by great books, and we know that community is an important element of personal and professional development. It can be difficult for NextGen Quality Professionals to engage with the greater quality community or to find people who are interested in discussing quality topics. As part of ASQ's NextGen initiative, the NextGen Global Advocacy Sub-Committee is hosting an ongoing book club. NextGen ASQ members and seasoned professionals: please join us on MyASQ starting in April to discuss your thoughts about *Atomic Habits: An Easy & Proven Way to Build Good Habits & Break Bad Ones* by James Clear (Avery, 2018). Find more details in the ASQ NextGen Community on MyASQ, [my.asq.org/communities/home/377](https://my.asq.org/communities/home/377).

Book Review | Dan Zrymiak

# Achieving Customer Experience Excellence through a Quality Management System

Alka Jarvis, Luis Morales, and Ulka Ranadive  
Milwaukee, WI: ASQ Quality Press | 2016 | 159 pages



This book provides an overview of how customer experience (CX) measures, impacts, and life cycles can be integrated within the framework of a quality management system (QMS) in an organization. The expectation is that CX can be improved by following the steps outlined in this book.

The first portion defines the specific characteristics of both CX programs and a QMS. From its historical origins, the connection is made to service assurance and customer experience management. CX is explained in contrast to customer service, user experience, and brand experience and is defined as the perception of customers' interactions with an organization and its solution. CX is described as both art and science, and its subjectivity is highlighted. The customer journey and multiple CX impact types (business, marketing, financial) are described. The CX life cycle, as defined by Cayuga Growth Partners, is referenced and described with examples and scenarios encompassing needs and wants, exploration and evaluation of solutions, and customer experiences for purchasing, provisioning, use, maintenance, and



## About the Reviewer

*Daniel Zrymiak is an engagement manager at Ultronauts, based in Surrey, British Columbia. He has more than two decades of international experience in quality and project management, primarily in information technology, operational excellence, and consulting. Zrymiak is an ASQ Fellow and has been awarded ASQ's Feigenbaum and Crosby Medals and a Testimonial Award. He is a Quality Press author and reviewer, and committee chair for the ASQ Edwards Medal. Zrymiak remains active with the Quality Management Division as a member leader and vice-chair of governance and excellence. He can be reached at: [Dzrymiak.asq@gmail.com](mailto:Dzrymiak.asq@gmail.com).*

renewal. Informative QMS origins and descriptions are included, referencing the scope and breadth of TC 176 and pertinent ISO management system standards. The seven quality management principles (customer focus, leadership, engagement of people, process approach, improvement, evidence-based decision making, and relationship management) are presented, along with an overview of the primary management systems.

The second portion of the book covers the relationships between QMS and CX. The risks of a silo mentality are provided as a

rationale for establishing mutual quality goals and essentials. A quality ecosystem is shown with seven elements (customer experience, policies, services, products, standards, processes, and improvement sustainability). The elements of the CX life cycle are mapped to corresponding clauses and subclauses of ISO 9001:2015, and this mapping is relevant and usable. This section provides a valuable resource for understanding the current ISO 9001 standard in the context of CX and customer satisfaction.



# Coach's Corner

## Navigating a Successful Path in Life

By J.R. McGee

A large percentage of my business is now Executive Coaching. And I won't kid you . . . it's the part of my life I enjoy the most. I recently had a session with a young lady I have been working with for several years. She has overcome numerous challenges and difficulties along the way to achieve her current position. By almost every standard, she has become a significant success in her chosen career path. And *that* appeared to be the problem . . .

As we started our session, she was uncharacteristically "down." When I pushed on that, she told me she was excited with her new promotion and where she was, BUT . . . And the "but" trailed, as I knew it would. She told me she was at a point where she had no idea where to go next. Even more concerning to her was that she had no idea how to find the path to get her there!

Sadly, I've had this conversation far too often in the past three years. COVID seems to have only brought the underlying issues to the surface for some of us. It's always been a fairly common situation. Olympic athletes go through this in painful detail. They spend every waking moment, sometimes for what seems a lifetime, preparing for that one race, that one event, where everything is on the line. And they win! A Gold Medal.

They are acknowledged as being the very best in the world at what they do. And that thrill is extraordinary! Then, over the next few days, they slowly begin to face a new reality. The problem is not with the success or the recognition. It's what happens a couple of weeks after the games are over. They wake up one day seemingly without purpose, without direction, and worst of all, without meaning. And they crash emotionally. Where do they go next? What do they do now? For some, it's an immediate return to preparing for the next Olympics. For most, it's a painful readjustment to find new goals and new direction for their lives.



### J.R. McGee

As Program Manager at "Top Gun" ranges world-wide, J.R. specialized in operations, training, and development of Fighter Pilots, Special Forces, Combat Field Engineering, and providing operational support to Intelligence and Counter-Terrorism operations around the world. He was the host of the radio show "Behind the Lines" focusing on geopolitical and Middle Eastern affairs. He is a semi-regular guest on "Stand in the Gap Radio" with host Congressman Sam Rohrer Middle. He is currently the Geopolitical and Eastern Affairs advisor for congressional candidate Kathy Barnett. He was Program Manager for seven major intelligence collection programs and was the Lead Subject Matter Expert for Program Management reporting to the Board of Directors for Lockheed Martin. He authors an Executive Coaching column for the Quality Management Division Forum. He was awarded the ASQ Roger Berger Award for outstanding leadership support for Quality Knowledge and Operational Excellence to the Global Quality Community. He is Chairman of the Board for Child Care Connections and sits on the Board of Directors for the ASQ NextGen Program for Future Leadership Development for Quality Management, and the Board of Directors for Aqua Vitea. He is currently the Founder and CEO of the X-Stream Leadership Group and X-Stream Training Services.

Many of us achieve some level of recognition in our careers as quality professionals, engineers, program managers, or just life in general. And we often face the exact same situation my client/friend was experiencing in her life. Here's what I told her . . .

We must be able to plan for success. That is certainly not new information. What might be new is that the way some people plan their lives is an almost guaranteed failure mode. They set a goal and then work towards that goal relentlessly. After a while, they begin to get very discouraged when they fail to see the results they expected. My work with Special Forces and Counter-Terrorism has taught me several powerful lessons in this life. Number one is that EVERY mission or objective is planned by extremely high-performance teams in the exact same way: Backwards! They spend the vast majority of their time defining two points: where they will finish and where they will begin. In that order! PRECISELY and without any ambiguity. And of these two points, the finish line is by far the most important to define without ambiguity or imprecision.

It's the very same process as GPS. It knows specifically where it is, and you tell it very specifically where you want to be. The algorithm then plots the course from *end to beginning* to provide you with the fastest or the most scenic route possible. When you have your two points in life clearly identified, then and only then can you plot a course through the mountain tops, the valleys, and around the obstacles of life to achieve success. As Steven Covey taught the world, begin with the end in mind! What constitutes success? How will I be able to know PRECISELY when I have truly "arrived"? It's by spending a lot of time clarifying exactly how to define what the end looks and feels like. Let's examine how we do that for a life-long journey.

One of the most powerful questions I ask my coaching clients is, "What do you want people to say or remember about you at your funeral? What stories do you want them to tell about you?" These are extremely powerful questions. And they make most of us very uncomfortable because we don't want to think about our end of life. Get over it! Answering those questions tells us how we can determine whether the things we spend our time and our efforts doing are the right things! For some, we want to be remembered for what we did. For others, for what we had. For the highest performers, it always seems they are focused on being remembered for what they did for others. Whatever motivates you is absolutely OK. It's your life. You get to live

it YOUR way. But think long and hard about what you leave behind. Your legacy will be uniquely yours. But rest assured, every single one of us *will* have a legacy . . . It's simply a matter of how that legacy will be remembered.

Why is spending so much time on how you finish so critical to achieving your uniquely desired success in life? It's because only by truly defining your ending can you understand what it's going to take to get you to your desired destination.

Therefore you must be brutally honest with yourself about where you are NOW. What are your strengths, your weaknesses, your developmental needs, and your opportunities? Yep, you should do a SWOT analysis on yourself. And be brutally honest! Never forget: The truth will set you free!

Once you have your *start* and *finish* points clearly defined, you can begin to understand what you must do to get from where you are to where you want to be. Without needless detours or dead ends.

Once you have this clarity, you can ask yourself every day the KEY question: Did what I accomplished today move me closer to my final objective or further away? This level of clarity also allows you to see where huge time wasters are in your schedule and your life. I'm not saying you should eliminate those things that are fun . . . far from it! I'm saying that now you can begin to ask yourself thoughtful questions and have the proper context around them to provide yourself with meaningful answers. We have a limited number of hours in this life. Use them wisely!

There is more to this way of thinking . . . But that is for another session!

Now go do something spectacular!

Very Respectfully,

**J. R. McGee**

Master Black Belt Sensei DVIRC

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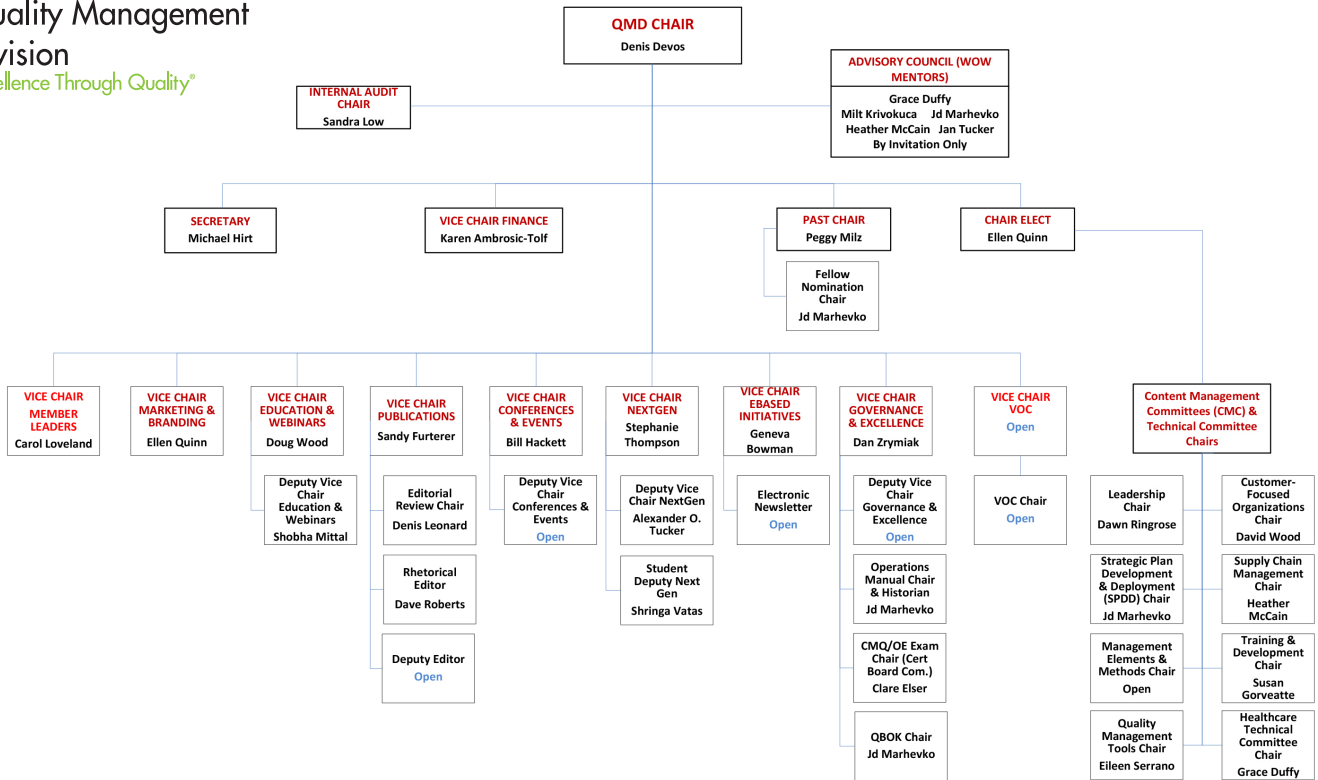
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