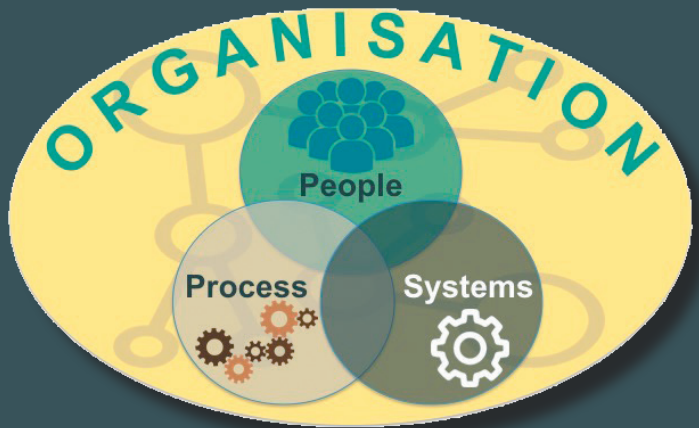




Implementation of Business Excellence



*A practical guide to
bringing about change*

Dave Manning
DM Integration Ltd (DMi)



BUSINESS EXCELLENCE an Implementation Guide

by

DAVE MANNING







"I am driven by the firm belief that the development of people is the most critical success factor for any business. It is my mission to bring about a fundamental change to the face of industry by pioneering 'Leadership Through Integration' of people, processes and systems.

"To achieve my mission I will draw from my 30 plus years' experience in manufacturing together with my drive for business excellence and lifelong passion for people and horses."

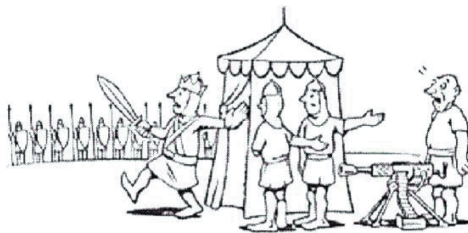

Dave Manning





To often organisations are frustrated with their poor performance and the complicated mess of their systems that are a mixture of legacy systems and spread sheets that appear not to be working.

Equally in a haste to implement systems they do not want to face the idea of doing it properly and continue doing what they have always done but with a new shiny system and several million pounds poorer! The following cartoon is great:



**NO! I CAN'T BE BOTHERED TO SEE ANY PESKY
SALESMAN.... I'VE GOT A BATTLE TO FIGHT!**

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In today's world all organisations compete in a hugely competitive global environment with improving technology. Our parents would have been amazed at the ability to do so much with a simple mobile phone. In fact, what is a mobile phone? Unfortunately in the pursuit of a competitive edge CEO's often reach for the weapon of 'Organisational Change'. However, as it was said many years ago:

"We trained hard – but it seemed that every time we were beginning to form up into teams we were reorganised. I was to learn later in life that we tend to meet any new situation by reorganising, and what a wonderful method it can be for creating an illusion of progress while actually producing confusion, inefficiency and demoralisation."

Petronius Arbiter
A Roman Courtier

Sometimes they are convinced that a new 'system' is the answer and engage in the implementation of the latest acronym of the year or initiative – ERP, APS, Six Sigma, IBP, SOP. Lean.

Fundamentally the principle that underlies all of these change programmes is improving the ability to deliver to consumers and customers what they want and when they want it – faster, at higher quality and at lower cost. What these programmes often fail to address is the integration of all the concepts and the integration between the people, processes and systems (see front cover).

This booklet describes a proven road map for a successful implementation of a change programme to make your organisation more competitive.

Phase 1 – Engage. Inspire Stakeholders and establish resources. During this phase a successful implementation engages the leaders of the business in a commitment to implement a Business Excellence project – which includes initial education, creation of a robust cost-benefit case that also identifies the opportunity cost of delay and establishes the right resources.

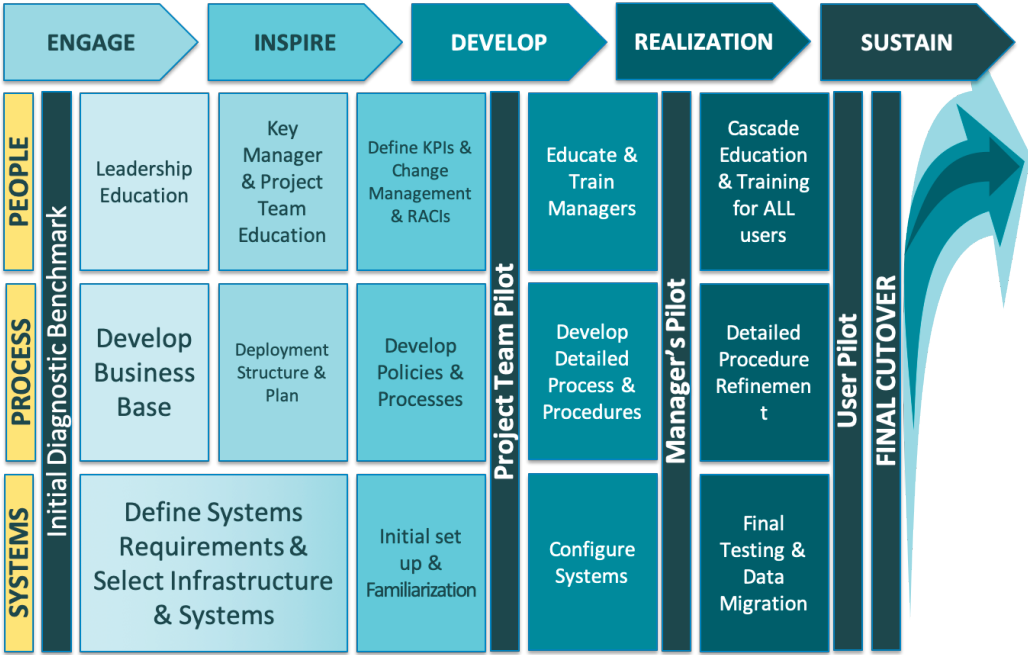
Phase 2 – Creation of the Extended Vision which describes the future operating organisation, culture, processes, systems and measures that will cover the Business Model that the organisation will adopt. Too often systems companies and implementation partners talk of the ‘As-Is’ and ‘To-Be’ as if they are talking about the extended vision; However, they often focus the scope to systems and processes and do not deal with the important other aspects

of a change programme. The extended vision is defined through a full-time Project Team and dedicated Task Teams.

Phase 3 – Education and Training of all the people. When people implement new systems the focus is often on training people how to use the systems. However, they fail to address why they need to change, and what’s in it for them. Hence, we believe key to the implementation of change is ‘Education’ which answers the question of why we should change.

This transformation proven path is summarised on the next page.

The ERP Transformation Proven Path



Assessment

A Business Excellence project should start with a formal assessment of the current situation to benchmark your performance against a recognised standard of Excellence. D M Integration have seen and worked with a number of different assessment programmes – European Quality Foundation, Class ‘A’, Twenty Keys, Gartner. DMi have also have developed an appraisal and assessment framework, which enable you to determine where you are on the maturity journey.

This should also lead your organisation to recognise ‘Discontent with the Present’.

Discontent with the Present

For real fundamental change to take place there must be three things in place simultaneously:

- A genuine discontent with the present
- A clear vision of the desired future state
- A path of least risk from today to the future

In many organisations there is a sense of complacency being driven by the fear of change and you will hear statements like “We are doing all right. After all we have been in business for years”

“It has always been like this. We can’t be doing things all wrong”.
To change this it requires the leadership team to drive the vision.

Peter Wickens was a very interesting leader. He was the HR and Systems (IT) Director at Nissan Cars when the factory was opened in Washington back in the 80s.

It is interesting to see this combination of roles which

showed great insight to the fact that systems are nothing without engaged people. One of his models shows that without the organisation develops it's people in unison with it's processes and systems it won't end up in the only box that is competitive – top right!

Wickens' Model



Based on Peter Wickens' Model



As Sir John Harvey-Jones said when he was Chairman of ICI – a successful chemical company in the 1990s.

“The real challenge is to keep things changing when things are going well – always to be seeking and demanding better performance, new products and new ways of doing things.”

ICI disappeared as an organisation, being sold off to its competitors in a large part

because of a failure to properly implement SAP as a system, which ultimately led to the removal of Brendan O’Neill as Chairman. See <http://www.computerweekly.com/feature/ICI-pay-price-for-side-effects-of-IT-project> for details.

Visits to other companies can be a very useful way of getting managers to understand what might be possible. D M Integration Ltd also organise a Best Practice Sharing Group known as ‘The Premier Group’ which is also an excellent way of learning from others.

Start-up Education

The purpose of start-up education is to allow the Board and Key Management of a company to understand what excellence should look like and develop an enthusiasm and commitment to strive for a better way of doing things. In particular, it is vital that they get a common understanding of how they could work for the better as a team with a common vision.

This start-up education will introduce the Senior Management team to the basics of business excellence and explain the concepts behind Integrated Business Planning, Supply Chain Management, Key Performance Measures, Data Quality and Critical Success factors.

It will also enable the Senior Management team to understand the cost of implementation, where the benefits come from, and the impact on the

organisation.

The problem that many leaders face when deciding priorities is that they can easily come to the wrong conclusions if they are inadequately informed. In a company, which has never worked with excellent systems and processes before, the value of ERP, Lean, Six Sigma the debate typically has two possible outcomes.

First is that they cover their confusion and ignorance by rapidly rejecting those ideas along the lines of “that will never work here” or second there will be a long debate about how these concepts might work, and how to apply them. Informed debate is much more powerful than uninformed ‘decisions’. Lack of education is like fog, as next page shows.

Lack of education creates limited management vision

Limited Vision



Education enables extended management vision

Extended Vision



Cost Benefit Analysis

The following figures have been slightly rounded but come from an actual company. The cost benefit analysis was performed during the period that the Board of Directors were deciding whether or not to pursue a Business Excellence strategy. This followed the start-up education process which gave them the foundation upon which to base their assessments.

The most significant fact is not the figures in this example, but the fact that the Board of Directors themselves went through this exercise, and at the end of it completely understood the figures and believed they were achievable. This fact ensured a high degree of commitment throughout the life of the project, particularly when other business issues put pressure on the priority of the Business Excellence programme.

In this case the project benefits of £1,853,000 per annum were achieved, and in fact many areas of the company achieved greater than their projected benefits. It should, however, be noted that as the implementation process drags on not only do the costs increase but the achievement of what are in most cases very significant benefits is delayed.

Cost Benefit Analysis
(Profit Statement & Prospective Benefit)

	£M	Improvement	Annual Benefit £K
Sales	40	5% (50% Contribution)	1,000
Cost of Sales	25		
Direct labour	5	5%	250
Materials	15	3%	450
Profit Before Tax	2		
Inventory Values	10		
10% Carrying Cost	1.0	33%	333
			2,033

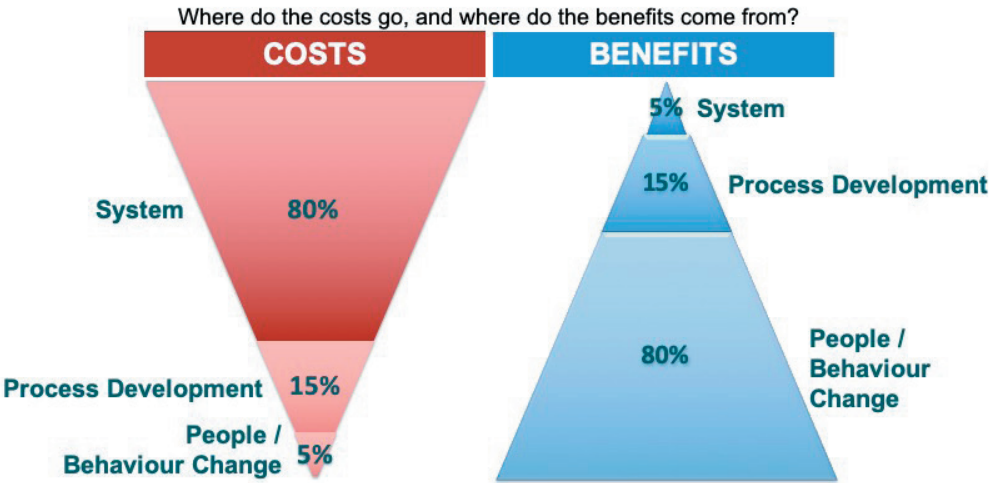
Cost of Implementation

	One Time	Ongoing
Hardware	400	60 Equipment
Software	750	22 Licence
Programming	60	30
Data Quality		
• Inventory Records	155	15 Equipment & People
• Bills of Material	30	
• Routings	30	
Education		
• External	90	15
• Internal	50	10
• Direct Labour	30	5
Project Manager	60	
Full-time Project Team	120	
Outside Consultancy	75	5
Miscellaneous	125	18
	1,975	180
Total Annual Savings (£K)	2,033	
Ongoing Costs	180	
Net Benefit per Annum	1,853	
One Time Costs	1,975	

This illustration shows a pay back of slightly more than a year.

Another important factor is that is also shows a cost of one-month delay of £154,416 which should be a powerful antidote to procrastination and analysis paralysis.

Costs and Benefits of Education – the 80:20 Rule



80% of the benefits come from behaviour change driven by education, but it only represents 5% of the cost.
80% of the cost come from the system, but only 5% of the benefits.

PROJECT ORGANISATION

Steering Committee

Those involved on the Steering Committee will be at the highest level within the organisation, and should include the Board of Directors and the Project manager. This committee should be headed by the Managing Director/CEO who will be responsible for driving the Project Team and ensuring all tasks are completed on time.

The Steering Committee's key tasks include:

- Freeing up resources and managing the redistribution of tasks if required
- Resolving any crises which may occur during the life of the project
- Monitoring the project schedule
- Developing the Integrated

Business Planning process (the Steering Committee also acts as the IBP Task Team)

- Setting up the Master Production Scheduling and Supply Chain Management policies with the MPS Task Team
- Ensuring that the Business Excellence project remains an extremely high priority and not an IT project.

Project Leader

This project is obviously something which must be taken extremely seriously and, as such, a full-time Project Leader must be appointed to co-ordinate and manage the activities, ensure that all deadlines are met, and all information is gathered and managed.

The Project Leader needs to be extremely knowledgeable of the company, as well as being somebody who has

natural leadership skills. The key ingredient for this person must be credibility within the organisation and as such could come from any of its functions. Any function is almost correct because the person should not come from the MIS or IT function. Business Excellence is not a computer project and such an appointment would send out a completely wrong message.

Members of the Project Team

Members of the project Team should be recruited from within the business and, again, they should be full-time. This is not a project which can be brushed aside in favour of golf or extended lunch hours. Full-time means just that – there is a tremendous amount of work to be done in most organisations, and it should be given the respect it deserves. For this reason, it is vital that when this process begins it is given complete commitment

by the Managing Director/CEO. Commitment in this case does not mean support or involvement, it means commitment. I am sure you all know the old story about the difference between involvement and commitment, and the traditional English breakfast; the hen is involved but the pig is very committed – and we need commitment from all members of the company's senior team.

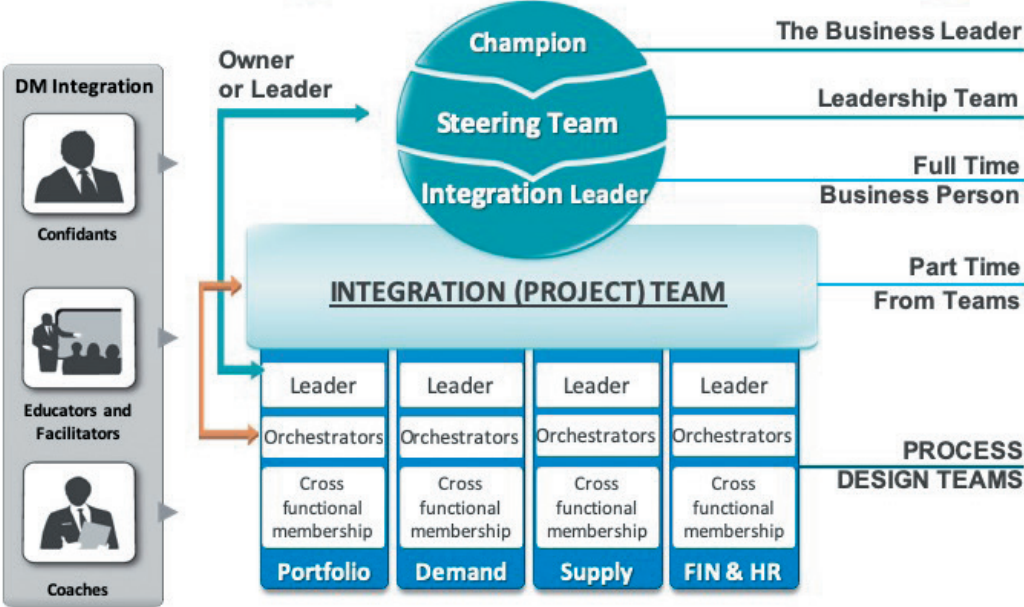
Process Design Teams

The Project Team have very clear responsibilities, but these do not include the setting up or improvement of all the necessary support activities. That task must be taken on board by a series of specific Design Teams. Their role is to work in areas such as inventory record accuracy, performance measures, setting up the master production scheduling process and bills of material structuring and accuracy. The teams are

resourced from within the various functions on a part-time basis, but, once again, are co-ordinated by having one of the full-time Project Team members as a member of each Design Team. The Project Team member should not take responsibility for chairing or leading these

tasks; that should be left to the appropriate functional senior manager or director. In this way the continued commitment and involvement of the senior team is more easily maintained. We believe that each Steering Committee member should lead a Design Team.

Organisation for Change



CREATE THE EXTENDED VISION

Role of the Project Team is to create the Extended Vision

This is a key feature of our approach in comparison with those companies who mistakenly implement new systems.

Firstly, it should document the overall Vision and Strategy of the business. Sometimes these do not exist formally within the business, and this can be the first step in the whole process.

Secondly it should be built around a number of 'Chapters' which relate to the various processes to be covered. As an example these 'Chapters' might cover:

- Annual Business Planning
- Integrated Business Planning
- Sales Forecasting and Demand Management
- Customer relationship management
- Master Production Scheduling
- Material Planning
- Capacity Planning
- Procurement
- Factory Management
- Warehouse Management
- Financial Cost Management
- Performance Management
- Human Resources management
- Data Quality Management
- Quality Assurance

CREATE THE EXTENDED VISION

Each Chapter can usefully describe the current situation and the problems with the current ways of working. This should cover:

- Organisation
- Processes
- Policies
- Roles
- Responsibilities
- Performance Management
- Software

And then describe the desired future state.

It should then describe the changes required in the way the business will be run, the organisational structure to support this, the behaviour change required to support that area, the Performance

Measures that will encourage the behaviour, the software changes and finally the Critical Success factors to bring about the change.

The development of the extended vision is the definition of how the business will apply the principals of ERP, Lean and Six Sigma in order to meet its Vision, Objectives and Strategy.

Effectively the Extended Vision

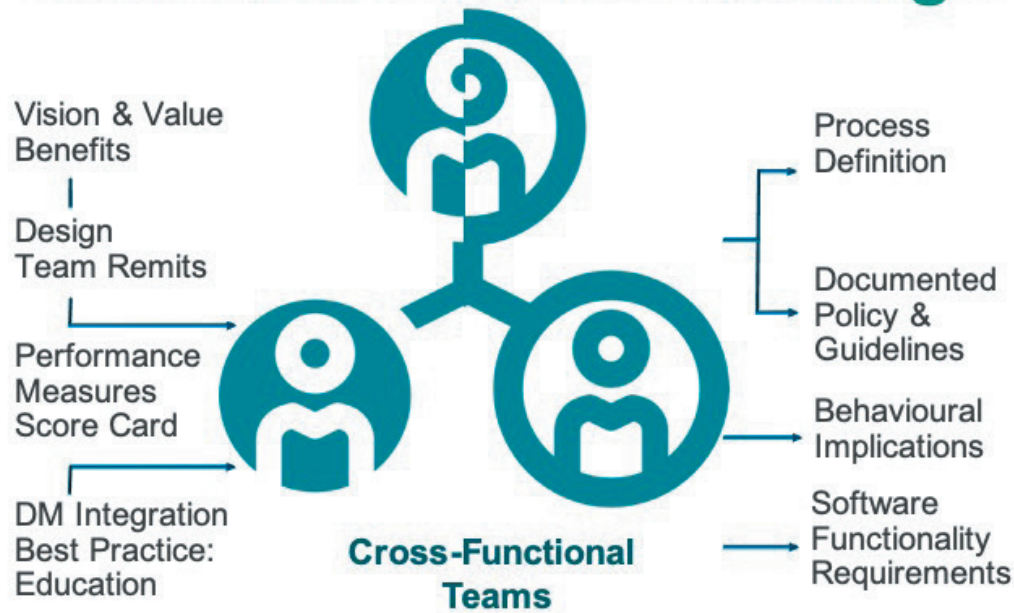
Is an exercise to create the new Business Operating Model for the company.

It is created in the first place by the Project Team, in conjunction with the Steering Committee, in other words, the key people in the company will define the future way of working.

Once this comprehensive vision has been created, then the next stage is to roll this out across the whole organisation through a cascade education process.

This also explains why it is essential to have the best minds and those that will challenge today's status-quo supporting the Project Team.

Business Process Redesign



SOFTWARE SELECTION

A company that has suitable systems available and does not plan to change may still decide to implement a Business Excellence programme. If both hardware and software are to be selected, the choices in the market place are numerous.

The potential of 'paralysis by analysis' should be avoided. The software and/or hardware choice should be made by the Project Team within the first 60 days of the implementation phase as part of the, what we refer to as the, 'Company II' development process.

Understanding the requirement of the business are a prerequisite to making the right selection. For example, some companies may need lot traceability and/or distribution planning whilst others may have differing needs. Quickly narrowing down the choice of both hardware and

software to a significant few, as well as checking with successful users will speed up the selection process.

EDUCATE, COMMUNICATE AND TRAIN

Education and Training

Education and training are at the core of our approach and key to the success of any implementation. Most projects compromise on this area which is why they fail.

We deliberately distinguish between these two words.

Education should be designed to expose Managers and key individuals within the organisation to Business Excellence. This should cover excellence in Planning, lean and Quality management and covers best practice conceptually in how those ideas can be made to work for the organisation. Education forms the ‘Bridge’ between the tools and the philosophy of the organisation.



EDUCATE, COMMUNICATE AND TRAIN

Training

Training is the process of ensuring that everybody in the business understand thoroughly how to use the tools – and in particular the software tools, which they will use to support the business processes.

When driving a car, before you go out on the road you learn the theory of how to drive a car, and you learn the Highway Code. You then go with a driving instructor on the road, to learn how to steer the car, do a three-point turn, reverse and change gear. Finally, you go through a driving test to ensure that you understand what you have learnt.

Thus, in a business, everyone should understand the concepts behind Master Scheduling, including Time Fences and how

to set Safety Stocks, together with Materials Planning and Capacity Planning. The people who are directly involved should learn how to do Master Scheduling in their chosen system, so that they can solve problems and ensure a balanced plan.

EDUCATE, COMMUNICATE AND TRAIN

Education Process and Timetable

The approach that works best is to cascade the education and training through the company. The one fact to recognise in planning an education programme is that it takes around 80 hours for an individual to grasp the concepts and apply these to their situation.

We see there is a need for three Phases for the Education.

The first phase is for the Senior Management Team, project Team and key influencers to get education as part of the development of the extended vision.

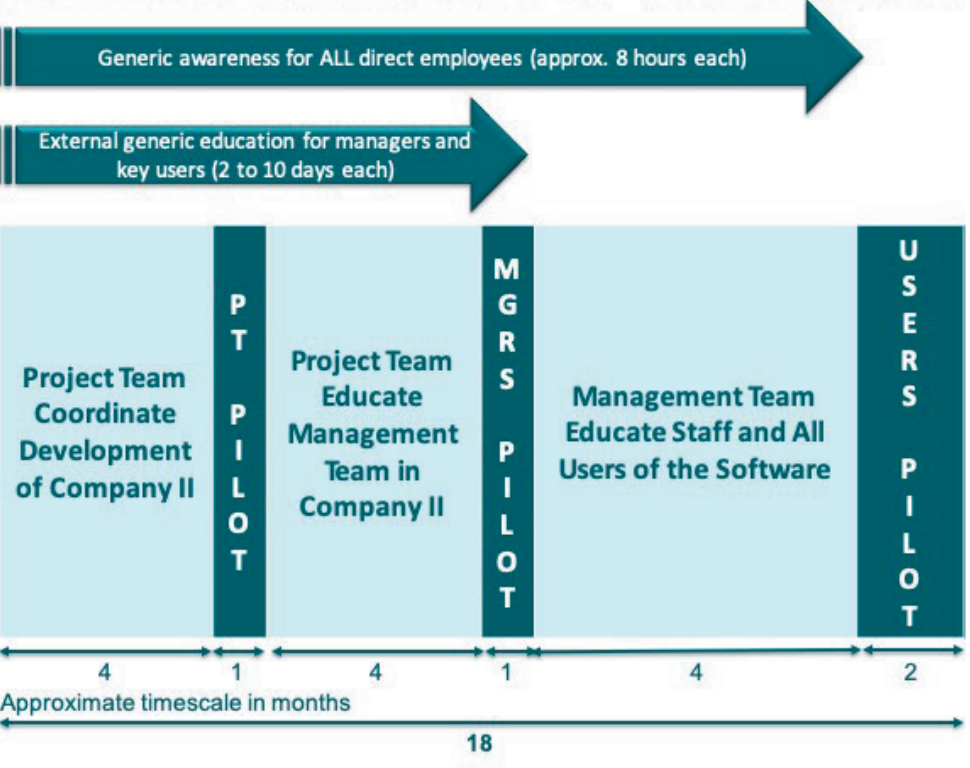
The second phase is for the Project Team to educate and train the managers and Design

Team members in the details of their Vision of how the company will look, through a combination of description of processes and illustrating how the software will work.

The third phase is for the Managers to educate and train the key users in the concepts and the practical detail of how the processes will work.

After each phase there should be a conference room pilot in order to cement the understanding and also to validate the training. The overall timetable is illustrated on the following page.

Education Process & Timescales



PATH OF LEAST RISK – PILOTS

Pilots to Test Readiness

As we mentioned previously, one of the key ingredients for successful change is to follow a path of least risk, in order to get from the present to the vision of the future. The various pilots along the way during the implementation phase act as a ‘stress-test’ to validate the model and provide insurance against the risk of failure.

There are in principal three types of pilot, all of which have their place in an ERP implementation:

- Software familiarisation pilot
- Conference pilots
- Live Pilot

The software familiarisation pilot is conducted by the Project Team during the development of the extended vision. The objective

of this is to enable the Project Team to learn about the software and to identify any necessary modifications, and perhaps discover ‘bugs’ which require the software to be corrected. At this stage, not all interfaces will have been written between any of the different systems that the company will implement, and so each software will need to be reviewed separately.

The best way for this pilot to be arranged is for each of the team members to run through the entire system on an individual basis, using a limited amount of dummy data, which represents the company’s manufacturing and distribution process from end to end.

PATH OF LEAST RISK – PILOTS

This will enable the whole team to become familiar with the whole system and also allow for the discovery of issues as those less familiar with parts of the system may well discover problems not found by others. It also ensures that the project team members learn the total system and will understand the impact of one part on another.

It is therefore a mistake to divide the system into modules and give each module to a team to test – particularly if they test their own ‘familiar’ area.

Project Team Pilot

This will follow the development of Company II. This should be arranged as a conference room pilot, during which the team tests out the business model processes. As well as testing how the company intends to

use the software, it should also test policies, procedures, roles, responsibilities and measures that are proposed.

Management Team Pilot. This pilot should take place after the Management Team education has been completed. The objectives here are to:

Validate that the overall model developed through the Task Team activity, with detailed policies and procedures will now work, alongside the organisational changes that will be introduced.

Validate that there is complete understanding by this team who will now be the trainers of the users at the next stage of the process Cascade Education). It is a further opportunity to revise any of the policies and procedures, if issues are discovered.

Users Pilot

This will take place immediately after all the users have received their education and training. Depending on numbers, there may be one or several pilots. The objective for this pilot phase is to ensure that everyone has an opportunity to carry out their job in a pilot environment. Therefore, it should operate with as many parts as will create a reasonable simulation of the business. Lead times may need to be shortened to enable sufficient activity to take place during the pilot. Capacities on work centres similarly may need to be reduced. Otherwise the look and feel should be just like the 'real world'.

Each of these conference pilots should try to simulate the running of the business. A number of business cycles should be simulated, using realistic data. Key to making this work is to develop a

number of scenarios – like abnormal demand, a failure to deliver, reject product etc. Hence everyone within the new operating structure will be able to take part in the way the company will run. The User Pilot must also be run using the final version of the software, including all tested interfaces.

Live Pilot

Ideally this is the last confidence pilot before preparing to go live. It should be operated for no more than one month before the rest of the company cuts over to the new processes. It should be built around a product which is completely isolatable from all other products – from a material, resource and personnel standpoint. However, it is often difficult to find a product line of this nature and so many companies discover that it is not practicable to conduct a live pilot.

PATH OF LEAST RISK – PILOTS

Cut-over

Many people have debated whether a company should implement in a modular fashion or with 'big bang' and often portray 'big bang' as being somehow dangerous.

Implementing in a modular fashion only creates problems with interfacing parts of the system to other parts of current system and will create more problems than the approach is trying to avoid. Due to the integrated nature of EPII systems it is virtually impossible to turn them on in a modular manner.

In fact, this project is implementing a new company integrated way of working which cannot be implemented in a modular fashion. It is the quality of the education and training and the use of

conference room pilots that will considerably reduce the risk of problems after going live.

Hence planning cut-over is a key activity. Ideally the systems should be switched on over a long weekend or during a holiday period. It is also a good idea to create a cut-over team who come into being around 4-5 weeks before live, who will be responsible for running the system through over a trial cut-over weekend, in order to check through the outputs from the system at that point. They can check capacities at work centres, whether there are items with missing BOMs and routings etc so that these can be corrected before go live. This activity should take place for 3 to 4 weekends before go live.

PATH OF LEAST RISK - PILOTS

But before you cut-over, there are a number of prerequisites which should be checked before committing to going live. These are:

Cut-over Check List - Key Factors 'Go / No Go'

1. Data integrity complies with the basic requirements for operating a planning and control system
 - a. Inventory record accuracy = 98%
 - b. Bill of Material accuracy = 98%
 - c. Routing accuracy = 98%
 - d. Work centre accuracy = 98%
 - e. Planning data = 98% accuracy
2. The Integrated Business Planning process is working effectively and at least six cycles have been operated with the process performance measures demonstrating it works.
3. MPS framework is identified and in place – i.e. Time fences have been agreed, abnormal demand policies have been agreed and Safety Stock levels have been set up.
4. WIP has been cleaned up and only relates to open works orders and there are no past due orders on the system or physically in the factory. All dates must have been cleaned up and are valid.
5. There are no arrears or wrong dates on purchase orders
6. There are no arrears on customer orders and all due dates reflect the best possible information on promised due dates. Any potential late deliveries have been communicated to customers.

7. 100% of people within the company have received education and training in the principle of Business Excellence and understand how this will work.
8. All managers and key users fully understand the new Business Operating Model – Company ii- and how it will operate.
9. The supporting software is based on standard logic and customisation has been kept to a bare minimum. It should have been thoroughly tested – particularly with respect to interfaces between systems.
10. The Company is committed to the Pilot method of implementation as the line of least risk and those pilots have been successfully or are being successfully implemented.
11. The process owners have signed off that the above ten conditions have been met in a meeting of the Senior Leadership Team and Senior Managers

THE JOURNEY AHEAD

The Road to Business Excellence



It is easy to think of progress to Business excellence being a journey without end. It is true, the basic philosophy of 'Continuous Improvement' implies that it is a never-ending journey.

THE JOURNEY AHEAD

The original assessment was called Class A and many companies have pursued this accolade. A Class A MRPII or Business excellence user is one which uses a completely integrated planning approach, based on a strong foundation of accurate data. The tools of Lean are integrated with Six Sigma.

The Management Team see this as the system which runs the company and will constantly monitor its performance in data accuracy, schedule achievement and supplier performance as part of an integrated set of measures.

In a Class A company, the Business Excellence model provides the single game plan to which all functions work to. Lean drives root cause analysis and Six Sigma encourages the quality of all processes to achieve better than 3.4 parts per million

defects through formal problem solving.

Successful Implementation



SUMMARY

The Ten Commandments of Business Excellence:

- i. Thou shalt establish accountabilities for the accuracy of thy data
- ii. Thou shalt set objectives and measure thy performance
- iii. Thou shalt not place thy least experienced in thy company's most critical positions
- iv. Thou shalt not economise in educating thy people
- v. Thou shalt not endeavour implementation without experience
- vi. Thou shalt not duplicate the informal system on thy computer
- vii. Thou shalt not omit tasks in thy haste nor prolong them for thy comfort
- viii. Thou shalt not bear false witness, declaring 'Business Excellence' to be a 'data processing' system
- ix. Thou shalt not expect ERP II, Lean or Six Sigma to eliminate all thy problems.

The original Ten Commandment still work. So should these.

SUMMARY

Many people when faced with this outline of how to implement Business Excellence immediately think that the task is huge and wonder how they can resource this project – providing an excuse to postpone it. Behind this concern lies an assumption that a lot of work needs to be done by a few managers. But that suggests that those managers do not understand the fundamental basis of ‘Business Excellence’. It is evolution rather than revolution. Additionally, we believe that all managers are doing their job effectively if they spend up to 80% of their time doing their job, and 20% of their time improving their job, and others around them. In a properly focused and well understood Business Excellence programme all employees are involved. The Executive and other key managers promote, support and facilitate the efforts,

but everyone in the company has the opportunity – and the obligation – to participate in some way. Hence, properly organised, the whole company are involved and not just a few managers.

The schematic in this booklet shows an eighteen-month implementation process, following the initial set-up phase. The eighteen-month time-scale covers the period required to implement the ERP system and supporting processes. But it is not a project with a finality, but creates a business based on continuous improvement. The purpose of this booklet is therefore to provide a road map on how to get started and really get competitive. JDI – Just Do It! Then look forward to the many productive and exciting years ahead.

A FINAL THOUGHT

Clear Roles & Responsibilities

Whose job is it anyway?

This is a story about four people named Everybody, Somebody, Anybody and Nobody.

There was an important job to be done and Everybody was asked to do it. Anybody could have done it, but Nobody did it. Somebody got angry about that, because it was Everybody's job. Everybody thought that Anybody could do it, But Nobody realised that Everybody wouldn't do it. And so it ended up the Everybody blamed Somebody when Nobody did what Anybody could have done!

**FURTHER TITLES
AVAILABLE IN THIS SERIES.**

The Great Lean Bake Off –
Dave Manning

**Secure Based Leadership and
the Culture Change Bridge –**
Dave Manning

about the author

Dave studied computer science at Sheffield University before entering industry with British Steel at their River Don facility in Sheffield. He now looks back at that time as a defining moment in his career. Having been brought up in a very practical/farming background, he was fascinated by the process of industry, recognising that many of the common sense and practises of farming equally applied to business processes.



Having spent some time in the software industry, where he was involved in the development of planning and scheduling systems, the desire to be involved in the practical process of real business change lead him to join Rolls Royce and Bentley Cars. During his seven years at Rolls Royce he was responsible for the development



of manufacturing systems before becoming a prime mover in their supply chain/ERP implementation programme. This eventually led to one of the Rolls Royce divisions achieving Class A against the Oliver Wight ABCD checklist.

In 1987 Dave left Rolls Royce to set up his own education and consulting company. He specialised in the integration of Planning and Control, Continuous Improvement and Change Management. He now focuses on the implementation of change through strategic alignment of the Integrated Business Planning Process, Extended Supply Chain Management, Continuous Implementation and Change Management are particular expertise of Dave.



about the author

He has worked extensively in Asia, Africa, Russia, the Middle east, Europe, the USA, South America and of course the UK in a complete cross section of industries, which include chemical process, food, electronic, tobacco, engineering and automotive. Companies such as CAT, Abbott Laboratories, UCB, British American Tobacco, Philips, Hallmark Cards, TR Fastenings, MARS, JCB, Cadbury Schweppes, Perkins, Pladis, Xtrac, Henkel, Betty's and Taylors and Akzo Nobel have all been supported by Dave's unique style of education and consultancy.

Dave holds a BSc in computer sciences and a MBA from the University of Northern Washington, he is also a fellow of the Chartered Institute of



Logistics and Transportation (CILT).
He has written many published articles
on Business Excellence and is extremely
sought after as a very entertaining and
practical business educator and speaker.

Recently he has spent
18 years in Oliver Wight, 5 year with
The Delos Partnership and now, his
own company, DM Integration Limited
(DMi).



Profile of a Farmers Boy

I grew up the son of a farmer in North Wales who had previously been a riding instructor in the Army which I'm sure is where my passion for horses originates. As well as being passionate about farming and the country side those early years on the farm were my first exposure to business as I observed my father work hard, as all farmers do, to make a living. My mother had come from a retail background and so when I was about 9, we moved from the farm to a retail business where my parents ran a couple of small grocery shops. This was my second exposure to business observing them again working hard, 'open all hours' but with a much more consumer and customer service focus. Still they needed to balance supply and demand with the right amount of stock and cash flow to make a profit. One of their suppliers was a small local privately-owned bakery who supplied bread, cakes and pies to my parents' shops. That gave me my third opportunity to learn about business and in this case my first exposure to manufacturing and supply chain which has turned out to be my career's focus. My job was to work in the bakery as the assistant to the Master Baker, so very much getting my hands dirty, or in this case hot! However, after an early morning shift in the bakery I loaded up the van and went on my delivery round. This was my first exposure to sales and customer relationship management, when I returned to the bakery at the end of my round it was also my first exposure to forecasting and stock control because I had to prepare the

forecast for the next nights production.

Before going to university in Sheffield to study Computer Science I spent the summer in Majorca selling tickets to boat trips and beach parties, now that was a ‘tough’ sell! But it taught me the importance of ‘people buy from people’ and that sales is about ‘asking for the order’, ‘not fearing rejection’ and ‘grunt work’!

After leaving university my business career really started, although looking back now the grounding that I had on the farm, in the shops, at the bakery and on the beach were all invaluable business lessons that have helped to shape my business values and beliefs.

My first ‘proper’ job was with British Steel at River Don in Sheffield. This is where my love of manufacturing really took root. Using my computer science background my first role was in the Manufacturing Systems Department, but I quickly learnt that the place to learn about manufacturing was in the factory so I spent a lot of time on the shop floor working with steel workers trying to see how we could combine our experiences to drive continuous improvement. I think my biggest lesson from that time was humility! The young graduate can’t try to ‘lord it’ over proud, skilled Yorkshire steelworkers! But if you can engage and relate to people, fantastic things can be achieved.

After a brief spell working in the IT industry developing



scheduling systems, I joined Rolls-Royce and Bentley Cars. Initially it was again in their manufacturing systems function but again the lure of manufacturing was too strong, and I ended up working with the Manufacturing Director on continuous improvement activities. In those days the car industry was a wonderful opportunity to see manufacturing and supply chain through all its processes. We machined components, built engines, painted bodies and assembled cars. The capacity and production planning, material planning and vendor scheduling processes were also very complex. This eventually led me to be part of the team who ran a 'transformation' project (that name hadn't been invented at that time) which redesigned all of the planning processes, implemented a new ERP (MRPII) system and most significantly brought about huge culture change. I was also privileged to work with one of the best leaders of people that I have come across. I believe it was working with the Manufacturing Director - Brian MaCapin and in the transformation project that were the triggers for my interest for change management and leadership development.

Since leaving Rolls-Royce in 1987 to form my own supply chain and manufacturing consulting company I have had the opportunity to work with a complete cross section of industry sectors from heavy engineering to FMCG and the service sector, to date in all 5 continents and 72 countries. Companies have included global organisations such as BAT, Abbott International, PepsiCo and Mars as well as much

smaller and privately-owned companies such as II-wins Bakery, Xtrac, Panache Lingerie and ARCO along with organisations such as the NHS and the Defence Aviation Repair Agency (DARA).

I have been privileged to work with so many companies, in so many countries with so many fantastic people in a field that has turned in to a lifelong passion.

I now have the opportunity to further develop one aspect of my passions and through my involvement with Horses 4 Change Ltd I can truly make a difference in organisations and with individuals and help them develop sustainable change management and leadership capability.

I feel very privileged to have had a career and work life balance in a field that I feel so passionate about. The work with Horses 4 Change of course takes me full circle back to the interest that was initiated by my father back on the farm.



*"The more you open up to the course,
the more you will benefit."*

Roy Evans
Unipart Rail



*"Be open with the team, and yourself,
and you will take something from
these amazing people and horses."*

Mike McCreesh
Coveris

*I think that it was the most important
professional experience for me in
2018.*

Patrycja Stas
PepsiCo





Tick the
missing piece
of the jigsaw:

- ☐ Leadership
- ☐ Teamwork
- ☐ People

At DMi & Horses4Change we help you make **ALL** the pieces fit with our unique **Equine Assisted activities** for leadership, personal and team development.



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- **Education**
- **Coaching**
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- **Consultancy**
- **Integrated Business Planning**
- **Demand Planning & Sales Forecasting**
- **Supply Chain Optimisation**

DMi Implementation through:

- **Articles & White Papers**
- **Public 'Leading Edge' Workshops**
- **Tailored Workshops**
- **Bespoke Workshops**
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- **Performance Measures & Critical Success Factors**
- **Leadership Development incorporating Change Management**
- **Team-building**



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