BMA Lite®: Defining a Visionary Leadership System for the New Millennium
Overview V1.7
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"Where there is no vision, the people perish"
- Proverbs 29:18

Introduction

People want to be valued in and for their work. Shareholders want profits in the private sector and taxpayers want worth in the public sphere. Staff and volunteers in not-for-profit bodies aspire to excellence in their chosen agencies or ministries. Senior management, indeed all stakeholders, desire success, personal satisfaction, ethical conduct, and efficient, effective organizations. Yet, organizations "happen". With the best of intentions, with the most sincere desires and the most intense efforts, companies, departments and agencies become mired in methods and policies that hold them back from real achievement.

There is no end of theory in place – much of it very useful – and yet organizations often fail to achieve their potential and often fail to satisfy their employees' yearnings to contribute to corporate excellence. BMA Lite® addresses these shortcomings in its lucid presentation of a distinctive system of mentoring for Business Excellence. This is an approach for industry – start-ups as well as more mature corporations - for government and for not-for-profit institutions and associations.

The BMA Lite® system assumes managers and their staffs are generally well-intentioned, have personal needs to succeed, feel benignly loyal to their organizations, and seek personal and financial satisfaction in their work. This system also assumes that people sometimes lose focus, spend time, money and effort needlessly, and play out their own ego struggles at the office. In other words, we generally behave like the imperfect human beings we are. Nonetheless, we all share a need to find and act on our visions, which characterize the changes we desire. We can do this individually and we can do this corporately. BMA Lite® assists managers in accessing a methodology that will make them, and

their organizations, all they can be through a comprehensive, systematic approach to continuous improvement.

Definition

BMA Lite® is a system of leadership excellence that stimulates managers and employees at all levels to bring work into full consciousness, while *at the same time* permitting management to embrace all relevant aspects of their organization. This system also structures work in such a way that all employees are fully aware of the essential services they perform. Moreover, BMA Lite® demands on-going evaluation by means of metrics and the Balanced Scorecard, thus creating an exemplar of continuous improvement.

How does BMA Lite® Differ from Other Management Models?

BMA Lite® is less a model than a complete management system deployed at the heart of an organization. There are many models of Business Excellence in use in North America, Europe and Japan. Some focus on the CEO level and rely on the cascading effect to take hold at the lower ranks. Some focus on the detail of how work is done. Each model has its strengths and uses. None, however, encompasses all the features of BMA Lite®.

How then is BMA Lite® a unique system? First, it is derived from a line manager's perspective and not from Quality Professionals. Nonetheless, BMA Lite® has taken the best that the work of the U.S. Baldrige Award (MBNQA) and Canada's National Quality Institute Awards for Excellence as well as Robert S. Kaplan and David P. Norton's *The Balanced Scorecard* have to offer and built on that solid foundation. It is therefore both theoretically sound and highly practical. These two attributes of theoretical validity and practical application explain BMA Lite®'s success in both private and public sectors. Secondly, BMA Lite®'s innovative, holistic, and elegantly simple methodology ensures clarity where there has been uncertainty and confusion, focus where there has been diffusion and wasted effort, and on-going evaluation resulting in timely responses to problems and challenges in the

workplace. This system moves the organization towards excellence *at all levels* while involving managers and employees in identifying their own missions, visions, strategies, metrics and services.

The Question of Assessments

If an organization has completed an assessment, it will likely find that it has identified the five most common assessment findings: first, the leadership direction is neither clearly articulated nor communicated throughout; secondly, if a vision and mission exist, they, along with strategies, processes and metrics are not linked at and between all levels; thirdly, neither work nor leadership processes are defined and linked; fourthly, there is no formal framework in place for fact-based decision making; and fifthly, the organization possesses no comprehensive and systematic approach to continuous improvement. The short answer to "what next?" following an assessment is implementing BMA Lite®, which addresses each of these findings and their resulting dilemmas. Whether an organization has completed an assessment and is asking itself how to proceed, or whether it has taken the shortcut of implementing BMA Lite® at the outset, the system is equally responsive.

The Core Values and Attributes of the BMA Lite® Leadership System

The unforced elegance of BMA Lite® depends on its **core values**: relevance, simplicity, clarity and deployability.

> **Relevance**: Managers and their employees are exposed to management models of varying usefulness, all of which claim to increase effectiveness to some degree. Each has its strengths and limitations. Most, however, either burden managers with too much detail or distract and even annoy employees with management theory that seems irrelevant to their jobs. BMA Lite® avoids these positions by creating a new system from quality initiatives and line management experience that ensures a positioning of information relevant to jobs at the appropriate levels.

> **Simplicity:** means that the system cuts through masses of detail to ensure that people consider only essential work elements in achieving objectives. This simplicity flows naturally from the system's relevance.

> **Clarity:** results from BMA Lite®'s common language for management and services effectiveness, permitting people to put aside their specialized diction and jargon, and thus

communicate readily and creatively with colleagues throughout the organization. This "common language" approach is startlingly effective in both industry and government. It becomes part of the organizational culture, encouraging clarity, communication and cooperation; it is the common and transportable language of business effectiveness.

Deployability: is the final core value of BMA Lite®. It creates a clear, simple, comprehensive and systematic deployment methodology for both leadership and workforce at all levels of the organization. This method stimulates fast and practical results in all sectors.

Attributes of the BMA Lite® Leadership System

Similarly, there are four **attributes** of the BMA Lite® Leadership System:

Emphasizes strategy development, deployment and measures:
Focusing on strategy implementation as well as on measures of success for each strategy ensures the achievement of desired results.

Aligns the leadership team and structure:
Especially in start-up companies, establishing clear objectives, strategies and measures aligned with the overall mission and vision of the organization, as well as for each function and senior team member, is vital for success.

Improves both leadership and work effectiveness:
Clearly establishing the criteria for both 'Leadership Effectiveness' as well as 'Work Effectiveness' brings focus to the organization.

Improves clarity of organizational boundaries:
Using BMA Lite®'s common language for business effectiveness repeatedly for each function, ensures boundary issues are clarified and resolved

Deploying BMA Lite®

BMA Lite® offers a simple method to help leaders identify and internalize the essential elements of business excellence. First, the leadership in the organization must accept that achieving excellence is their "day job", intrinsic to all functions and not an extracurricular activity. Further, the leadership must accept that problems are more about how people lead than they are about how people work. As Stephen George and Arnold Weimerskirch write in *Total Quality Management: Strategies and Techniques Proven at Today's Most Successful Companies*: "In its Baldrige Award-winning application, Cadillac Motor Car Company wrote, 'At Cadillac, the Business Plan is the Quality Plan'" (49). This notion of a holistic approach to quotidian excellence and leadership is fundamental to BMA Lite®.

Secondly, each management unit – at whatever level – is identified as an MVS Unit, so called because each MVS must have a Mission, Vision and Strategies that are vertically and laterally aligned within the organization. In all cases, the Strategies are developed with accompanying metrics that allow continuous monitoring and improvement.

Thirdly, each MVS unit defines its work as a set of Services, which are activities that consume non-management resources and provide value to someone *outside* the group or organization delivering them.

Fourthly, each MVS writes its narrative or "story", which includes Mission, Vision, Strategic Actions, its Services List, its Balanced Scorecard (financial, client / customer, processes and learning), and finally its emerging issues and next steps. This "ongoing story" captures the complete picture of an MVS over time, illustrates its strengths and clarifies its areas for action. The MVS story is about leadership and strategic effectiveness. The Service story is about operational or work effectiveness. Together, the MVS and Services stories reinforce fact-based decision-making. This fourth step is highly empowering.

Services

The "Service" categorizes work not as routine pursuits, no matter how entrenched within the work unit, but as visible effort with quantifiable value, which is delivered to the client(s) external to the working unit. The Service story continually asks and answers the following simple questions:

1. What visible, quantifiable output is delivered by the Service and at what trended cost?

2. What are the requirements of the recipients of this output, and how satisfied are they?

3. What are the high-level process steps used to deliver this output, and how are they continually improved?

4. What employee skills are (will be) needed to deliver this output, and what are the plans to acquire, develop and retain those skills?

Phases of Deployment

Phase I: Establishes a clear mission and vision for the company with a clear set of strategic actions and associated measures of success in the four quadrants of the Balanced Scorecard. Also, clarifies the functional management structure with associated accountabilities and "Services".

Phase II: Repeats the work of Phase I for each functional (VP) unit. The outcome is a clear mission and vision for each function together with the function's strategic actions and associated strategic measures. In addition, each function will clarify the associated headcount and costs for the "Services" it delivers (see overview of BMA Lite® under Pharos Services). Identification and resolution of all gaps and overlaps (boundary issues). Phase II completes the planning needed to ensure "Leadership Effectiveness".

Phase III: This phase addresses "Work Effectiveness", through the development of the framework for managing the "Services" delivered by each function. The outcome is a clear "story" for each Service.

Phase IV: This is the implementation support phase. This phase, from our experience, needs careful nurturing for success. Pharos offers support services, as required, to the Function and Service Primes during this final phase, which involves the ongoing collection and reporting of the measures of success captured in the Balanced Scorecards of the company or organization, the functions as well as the Services.

Critical Success Factors

There are three critical success factors associated with BMA Lite®. Once the Balanced Scorecards for the company, the functions and the Services are created, they must be collected, trended and used for:

1. Company performance review,
2. Functional reporting and performance review, and
3. Services reporting and performance review, as well as budgeting (based on the analysis of the Service's quantifiable output and cost).

Conclusions

In the Total Quality Management (TQM) journey towards excellence (the "700+ level" on the Baldrige scale), organizations deploying an assessment approach often become stranded at the 400 point level, preventing them from achieving "world class" status regardless of effort expended. On the other hand, deploying BMA Lite® permits organizations to "leap the wall" of resistance at the 400 point level. With the integrated BMA Lite® Leadership framework securely in place, organizations will be aligned with "Best in Class" companies where:

• Senior Management leads improvement initiatives,
• An integrated Leadership Framework, which links Strategy, Process and Results, is in place,
• Review and refinement is the leaders' "Day Job".