

## Bronnelys

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## **Bylae A**

### **Dekbrief en vraelys**



University of Pretoria

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Faculty of Economic and  
Management Sciences

School of Accountancy  
University of Pretoria

22 July 1999

Dear Sir/Madam

**Factors contributing to the success of a benchmarking project**

The School of Accountancy at the University of Pretoria is currently conducting a study regarding the factors contributing to the success of a benchmarking project. The investigation focuses on listed South African manufacturing companies. If your company has never undertaken a benchmarking project, please state this at the first question and return the questionnaire. All the information derived from these questionnaires will be treated as strictly confidential and no deductions will be made in respect of individual companies.

Benchmarking is a process by which an organisation targets key areas for improvement, studies the best practices of others and then implements processes and systems to enhance its own performance. Internal benchmarking takes place where internal divisions form benchmarking partners and no comparisons are made with the performance of an independent, external benchmarking partner.

A benchmarking project takes up a substantial amount of resources within a company. To obtain a good return on the investment made in a benchmarking project, it is important to establish which factors contribute to its success. Your input in this study is invaluable and a summary of the findings of this study will be made available to all participants.

Please contact Schalk Human on (012) 673 7456 (w), 082 463 1228 (cell) or send an e-mail to [shuman@centurion.momentum.co.za](mailto:shuman@centurion.momentum.co.za) if you have any queries regarding the questionnaire. I would appreciate it if you could return the questionnaire on or before 20 August 1999 in the enclosed envelope or fax it to (012) 671 8731.

Yours faithfully

  
\_\_\_\_\_  
H de Jager (Prof)  
Director: School of Accountancy



**Notes**

The questions below refer to the most recently completed benchmarking project undertaken by your company. Please mark the most appropriate answer with an "X".

The success of the benchmarking project must be measured in terms of the extent to which the results of the project met your expectations. Please bear in mind that success is not measured in immediate financial terms only, but also in qualitative and quantitative non-financial terms.

All the information derived from this questionnaire will be treated as strictly confidential.

1. Has your company previously undertaken a benchmarking project?

Yes  No

If the answer is yes, please complete the following questions. If no, please state likewise and return the questionnaire in the enclosed envelope.

2. How would you describe the main aim of the benchmarking project?

To collect comparative information for performance measurement	To improve a specific product	To improve a specific process	To change the overall strategy of the company
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3. How successful was the benchmarking project in your opinion?

Complete failure  Unsuccessful  Successful  Extremely successful

4. The extent to which the company's strategy, as a whole, was taken into consideration in planning the benchmarking project can be described as:

None  Little  High  Very high

5. The level of involvement by top management in this project can be described as:

None  Little  High  Very high

6. The extent to which critical success factors were taken into consideration in the benchmarking project can be described as:

None  Little  High  Very high

7. Did you do a cost : benefit analysis before you embarked on the project?

Yes  No

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V1    1-3

V2  4

V3  5

V4  6

V5  7

V6  8

V7  9

V8  10

V9  11



8. The length of the benchmarking project was:

0-3 months   
  4-6 months   
  7-9 months   
  10-12 months   
  > 12 months

9. In your opinion, did you try to achieve too much with this specific project?

Yes   
  No

10. The extent to which the company studied its own product or process which was the topic of the benchmarking project can be described as:

None   
  Little   
  High   
  Very high

11. Did your company conduct internal benchmarking before embarking on external benchmarking?

Yes   
  No

12. The extent of the company's previous benchmarking experience can be described as:

None   
  Little   
  High   
  Very high

13. The extent of the participation of external benchmarking consultants in the project can be described as:

None   
  Little   
  High   
  Very high

14. The extent of the training (specifically in benchmarking) of the persons involved in the project can be described as:

None   
  Little   
  High   
  Very high

15. The size of the benchmarking partner(s) as compared to the size of your company can be described as:

Smaller   
  Similar size   
  Bigger

16. How many benchmarking partners were there?

1   
  2   
  3   
  4   
  More than 4

17. The benchmarking partner(s) used in the project can be classified as follows:

All from the same industry   
  Mostly from the same industry   
  Half from the same industry   
  Mostly from other industries   
  All from other industries

18. The benchmarking partner(s) used in the project can be classified as follows:

All direct competitors   
  Mostly direct competitors   
  Half were direct competitors   
  Mostly not direct competitors   
  No direct competitors

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V10  12

V11  13

V12  14

V13  15

V14  16

V15  17

V16  18

V17  19

V18  20

V19  21

V20  22





19. The benchmarking partner(s) used in the project can be classified as follows:

All from South Africa	Mostly from South Africa	Half from South Africa	Mostly international	All international
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20. The extent of trust that existed between your company and the benchmarking partner(s) can be described as:

None	Little	High	Very high	Varied according to partners
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21. The extent to which resources such as time, money and equipment were allocated to the project can be described as:

None	Little	High	Very high
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22. Did you use a formal questionnaire to guide the benchmarking team in the collection of information?

Yes	No
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23. The extent to which employee inputs were encouraged on the benchmarking project can be described as:

None	Little	High	Very high
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24. The extent to which ethical - and moral aspects were considered in the benchmarking project can be described as:

None	Little	High	Very high
------	--------	------	-----------

25. The extent to which legal aspects were considered in the benchmarking project can be described as:

None	Little	High	Very high
------	--------	------	-----------

26. Did you sign an agreement with your benchmarking partners to keep the information gathered confidential?

Yes	No
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27. Did you agree with your benchmarking partners to abide by a code of conduct?

Yes	No
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28. Did your company conduct a pilot run before the actual benchmarking began?

Yes	No
-----	----

29. Did your company specifically decide that change was needed within a certain area before the project began?

Yes	No
-----	----

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V21  23

V22  24

V23  25

V24  26

V25  27

V26  28

V27  29

V28  30

V29  31

V30  32

V31  33



All the information derived from this questionnaire will be treated as strictly confidential

30. Did you formulate a formal plan to implement the changes that were identified during the benchmarking project?

Yes  No

31. The extent to which you kept to a timetable can be described as:

None  Little  High  Very high

32. The extent to which you kept to a budget can be described as:

None  Little  High  Very high

33. The extent to which people throughout the company was informed about the findings of the benchmarking project can be described as:

None  Little  High  Very high

34. Did you compile a report on the findings of the benchmarking project?

Yes  No

35. Name any other factors that, in your opinion, influenced the success/failure of the benchmarking project.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

36. In which sector does your company conduct business?

\_\_\_\_\_

The completion of the following section is optional

Name of company \_\_\_\_\_

Name of person completing the questionnaire \_\_\_\_\_

Telephone number \_\_\_\_\_

Thank you very much for your time and effort

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V32  34

V33  35

V34  36

V35  37

V36  38

V37    39-41

V38    42-44

V39    45-47

V40    48-50

V41    51-53

V42   54-55

## Bylae B

### Kontrolelys vir die uitvoering van 'n normeringsprojek

Dit is moontlik dat al die faktore wat bydra tot die sukses van die projek wat hieronder genoem word nie op die onderneming van toepassing is nie. Telkens waar die antwoord op 'n vraag "nee" is, moet alle negatiewe implikasies daarvan deeglik oorweeg word.

	<b>Faktor wat bydra tot die sukses van die projek</b>	<b>Ja</b>	<b>Nee</b>
<b>1.</b>	<b>Faktore wat verband hou met beplanning</b>		
<b>1.1</b>	<b>Kritiese faktore</b>		
1.1.1	Is 'n kostevoordeelanalise uitgevoer?		
1.1.2	Is 'n formele plan geformuleer om die verbeteringe te implementeer?		
<b>1.2</b>	<b>Belangrike faktore</b>		
1.2.1	Is die algehele strategie van die onderneming in ag geneem tydens die beplanning van die projek?		
1.2.2	Is die kritiese suksesfaktore van die onderneming in ag geneem op die projek?		
1.2.3	Is die produk of proses wat die onderwerp van die projek is binne die onderneming self bestudeer?		
1.2.4	Is voldoende hulpbronne aan die projek toegeken?		
1.2.5	Is 'n tydrooster opgestel?		
1.2.6	Word die vordering van die projek voortdurend teen die spertye in die tydrooster vergelyk?		



1.2.7	Is 'n begroting opgestel?		
1.2.8	Word die werklike kostes voortdurend gemeet teen die begrote kostes?		
<b>1.3</b>	<b>Ander faktore</b>		
1.3.1	Is interne normering voor eksterne normering toegepas?		
1.3.2	Is 'n formele vraelys opgestel waarvolgens inligting versamel word?		
1.3.3	Is 'n toetslopie uitgevoer voordat direkte skakeling met die normeringsvennote gemaak is?		
1.3.4	Is 'n besluit geneem dat verandering binne 'n spesifieke area benodig word?		
<b>2.</b>	<b>Faktore wat verband hou met die persone betrokke op die projek</b>		
<b>2.1</b>	<b>Belangrike faktore</b>		
2.1.1	Is topbestuur deurlopend betrokke by die projek?		
2.1.2	Is persone met vorige ondervinding in normering betrek op die projek?		
2.1.3	Is daar van eksterne normeringskonsultante gebruik gemaak?		
2.1.4	Is omvattende opleiding verskaf aan die persone betrokke op die projek?		
2.1.5	Is werknemers aangemoedig om insette te lewer op die projek?		

<b>3.</b>	<b>Faktore wat verband hou met normeringsvennote</b>		
<b>3.1</b>	<b>Kritiese faktore</b>		
3.1.1	Is aandag geskenk aan die vergelykbaarheid van die omstandighede tussen die onderneming en sy normeringsvennote (bv. grootte van ondernemings of land waarin besigheid bedryf word)?		
3.1.2	Is oorweging geskenk aan die optimum aantal normeringsvennote?		
3.1.3	Sluit normeringsvennote ook ondernemings in ander industrieë in?		
<b>3.2</b>	<b>Ander faktore</b>		
3.2.1	Sluit normeringsvennote ook direkte mededingers in?		
<b>4.</b>	<b>Faktore wat verband hou met die lengte van die projek</b>		
<b>4.1</b>	<b>Kritiese faktore</b>		
4.1.1	Is daar spesifiek gepoog om die tydsduur van die projek tot die minimum te beperk?		
<b>4.2</b>	<b>Belangrike faktore</b>		
4.2.1	Is daar spesifiek aandag geskenk aan die feit dat daar nie probeer word om te veel met 'n enkele projek te bereik nie?		

<b>5.</b>	<b>Faktore wat verband hou met die etiese, morele en regsaspekte van normering</b>		
<b>5.1</b>	<b>Kritiese faktore</b>		
5.1.1	Is etiese en morele aspekte deeglik in ag geneem op die normeringsprojek?		
5.1.2	Is regsaspekte deeglik in ag geneem op die normeringsprojek?		
5.1.3	Is daar met die normeringsvennote ooreengekom om volgens 'n gedragskode op te tree?		
<b>5.2</b>	<b>Belangrike faktore</b>		
5.2.1	Bestaan daar 'n hoë mate van vertroue tussen die onderneming en sy normeringsvennote?		
<b>5.3</b>	<b>Ander faktore</b>		
5.3.1	Is 'n geheimhoudingsooreenkoms met die normeringsvennote onderteken?		
<b>6.</b>	<b>Faktore wat verband hou met die afhandeling van die normeringsprojek</b>		
<b>6.1</b>	<b>Belangrike faktore</b>		
6.1.1	Is werknemers in diepte ingelig oor die resultate van die normeringsprojek?		
<b>6.2</b>	<b>Ander faktore</b>		
6.2.1	Is 'n verslag opgestel oor die resultate en gevolgtrekkings van die normeringsprojek?		