

**FORTUNE**

M A G A Z I N E

**Video Seminars**

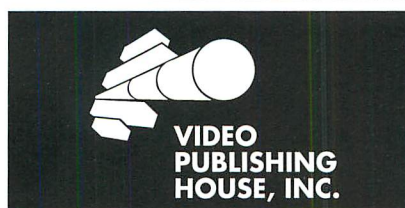
# Customer-Driven Quality

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*Presented by Richard C. Whiteley*  
*The Forum Corporation*

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# Video Seminar Overview

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## Purpose

Over and over again, research has indicated that those organizations that seriously embrace and successfully implement customer-driven quality as both an operating strategy and a leadership philosophy experience four important benefits. Customer-driven companies create:

- Revenue growth
- Increased profitability
- Faster turnaround time
- Improved employee morale

To some companies implementing quality initiatives, this process has been difficult, and the results have fallen short. To others, quality improvement is working in certain parts of the organization but not in others. And some companies are still studying how to get started.

The *Customer-Driven Quality* Video Seminar has an important message about quality implementation for each of these organizations. It tells clearly and concisely how to implement quality effectively throughout an organization and focuses on how to create the most important outcome: A customer whose needs have been met and exceeded.

Presented by Richard C. Whiteley, Vice Chairman and cofounder of The Forum Corporation, *Customer-Driven Quality* unifies and integrates concepts related to quality improvement, management, leadership, customer service, corporate vision and values, and work unit performance. The organizing framework is the concept of defining and meeting or exceeding customer expectations. As a result of understanding these customer-driven concepts and applying them to your own work, you will see how the different aspects of quality improvement work together to create loyal customers and outstanding financial results.

This Video Seminar is not a typical training program; it is a unique learning experience. Here are some features:

- You will learn how five successful customer-driven companies implemented their quality programs. Through interviews with managers, employees, and customers of these companies, you will see how challenges were overcome; how quality-improvement tools, concepts, and beliefs were applied; and the concrete results of becoming customer-driven.
- As part of the learning process, you will conduct your own research projects to discover how employees and selected customers currently perceive your organization.
- You will also have an opportunity to apply customer-driven quality ideas and concepts to your own work unit.
- Finally, you will create a Report to Management with an assessment of the organization on important aspects of quality implementation. This report will contain practical recommendations and advice which senior management needs and will welcome from different parts of the organization. This Report to Management is an important source of information for executives and, if its messages are heeded, a clear demonstration of management's commitment to customer-driven quality.

### Objectives

As a result of the Video Seminar experience, you will:

- Know the importance of customer-driven quality to the ongoing success of your organization.
- Diagnose your organization's readiness for implementing customer-driven quality.
- Identify how to improve the effectiveness of the quality improvement effort.
- Develop a Personal Agenda for introducing customer-driven quality in your own work unit.
- Provide senior management with a candid evaluation of current quality implementation progress and recommendations for consideration in a Report to Management.

---

### Seminar Structure

The *Customer-Driven Quality* Video Seminar is divided into eight segments, with each videotape segment serving as the core of a workshop experience that consists of a series of facilitated discussions, individual and team exercises, and assignments designed to explore and apply the concepts presented.

There are a number of Pre-Work Assignments requiring you to spend 30 minutes to one hour preparing for Seminar activities.

An important part of each Seminar segment is the opportunity you have to think about applying the learnings to your own job and work unit. These thoughts are to be recorded in the section called Your Personal Agenda at the end of this *Participant's Manual*. It is hoped that this document will serve as a resource long after the conclusion of the Seminar.

# Segment 1: Introduction and Overview

---

## **Purpose**

- To heighten the need to address quality issues as a means of competitive survival.
- To introduce customer-driven quality as a means of organizing a company's improvement initiative around meeting and exceeding customer expectations.
- To establish a Personal Learning Agenda for the Video Seminar.

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## **Discussion Notes**

### **Establishing Ground Rules**

---

## **Discussion Notes**

### **The Payoff for Quality: "10" Calibration Exercise**

## Segment 1

---

### **Videotape Segment 1**

As you watch and listen to Videotape Segment 1, use the space below to record your reactions, questions, and concerns.

---

### **Discussion Notes**

**Exploring the Concept of Customer-Driven Quality: Reactions and Opinions**



**Exercise and Discussion**

**Creating Future History**

Imagine that your company has won the prestigious “Customer’s Best Friend Award,” which is awarded annually to only five companies in the world.

**Instructions**

1. List the “headlines” (i.e., major steps) the company took to achieve its success.

2. Describe what executives, managers, and employees do differently now than they did in the past.

3. Identify the obstacles the company had to overcome internally to become customer-driven and how these were conquered.

# Pre-Work Assignment for Segment 2: Establishing Direction and Alignment

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**Purpose**

To assess the extent to which the organization's direction, vision, and values are known and understood within the organization.

---

**Instructions**

Using the questions provided below, randomly select and interview up to 10 of your fellow employees to determine how consistently the organization's direction, vision, and values are understood and interpreted in the organization.

### Suggested Direction, Vision, Values Interview Guide

1. Do you know the direction this organization is headed in?
2. Do you know our company's vision? What is it? Do you think a set of values exists for this company? What are they?
3. Do the direction, vision, and/or values affect how you do your work?
4. Do you think our employees are inspired by the vision?
5. How do you think customers are affected by the vision? What would a customer think or feel if they knew the organization's vision?

## Segment 2: Establishing Direction and Alignment

---

### **Purpose**

- To assess how well company direction, vision, and values are interpreted in the organization.
- To provide information to senior management about how the current direction, vision, and values are perceived in different parts of the organization.
- To develop a personal customer-driven vision or values statement.

---

### **Discussion Notes**

### **Working on Vision and Values**

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### **Videotape Segment 2**

As you watch and listen to Videotape Segment 2, use the space below to record your reactions, questions, and concerns.

## Segment 2

---

**Discussion Notes**      **Exploring the Concept of Establishing Direction and Alignment:  
Reactions and Opinions**

---

**Discussion Notes**      **Analyzing the Direction, Vision, and Values Alignment Data**  
What people said about direction, vision, and values:

---

How direction, vision, and values affect people's work:

**Vision Statement Analysis**

- Is it short and memorable?
- Does it include the customer either directly or indirectly?
- Does it inspire employees?

**Direction Analysis**

- Does it have meaning?
- Does it look to the future?

**Values Analysis**

- Do they provide guidance for making decisions?

### Group Exercise

### Improving Communication of Direction, Vision, and Values

Possible creative techniques for developing direction, vision statements, and values:

- Your Values: Think about what you and the people of the work unit value and believe is important in getting your jobs done. Then, list five ways of completing the phrase, “In our work unit, we really care about...”
- Customer Wants: Finish this statement, “If I were a customer of this organization, I would want...”
- A Picture: Try drawing a picture of how you want your organization or work unit to look to a customer “peeking” in.
- Analogy: Imagine your organization in terms of something else (e.g., an eagle, the summer). What characteristics of those analogies come to mind that would help you define your vision? For example, an eagle’s keen eyesight translates to anticipation or planning for the future.

### Instructions

1. Select a creative technique. Then work together to generate ideas for reconstructing the organization’s vision and values.
2. Select the best idea and develop it into a workable direction, vision, and values statement.
3. Test your statement against the Analysis Guidelines provided in the previous exercise.

### Our Improved Direction, Vision Statement, and Values

## Pre-Work Assignment for Segment 3: Listening to the Voice of the Customer

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### Purpose

- To focus on the experience of being a customer of another company and of your own organization.
- To explore the experience of internal customers who receive the products and services of your work unit.

---

### Instructions

**1. Be the Customer.** Think about your most recent visit to a restaurant, retail or department store, or other business or make a special trip to one of these places for this exercise. Identify what your expectations are for service and for the products involved. Consider:

- Responsiveness of the staff.
- Whether or not things were “done right.”
- The ambiance and the attire of the staff.
- If you felt “processed” or received “the personal touch.”
- The quality of the product.
- Any other treatment or expectation that is important to you as a customer.

Compare your impressions of the actual customer experience with your expectations, and be prepared to discuss the extent to which your expectations were met.

What were your expectations before the experience?

Were your expectations met? If so, how? If not, in what ways were they not met?

**2. Interview Internal Customers.** If possible, select three employees of your organization who receive the products or services of your work unit. Using the following interview guide, gather information about the extent to which their expectations are met.

### Internal Customer Interview Guide

1. What matters most to you in doing business with us?
2. To what extent are we meeting or exceeding those expectations?
3. Are our products at the level of quality you expect from a work unit like ours?
4. Is the service and support the level you expect from a work unit like ours?
5. To what extent is our work unit adaptable to your changing requirements?
6. To what extent do you think the people in the work unit are aware of your needs and expectations?
7. What are we doing well?
8. Do you have any suggestions about how we can improve?



## Segment 3: Listening to the Voice

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**Purpose**

- To create empathy for what customers experience when dealing with an organization.
  - To assess how internal customers currently view each participant's work unit.
  - To trace the impact of internal customer's views to the effect on the final customer.
- 

**Discussion Notes****Reviewing the Customer Experience**

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**Videotape  
Segment 3**

As you watch and listen to Videotape Segment 3, use the space below to record your reactions, questions, and concerns.

## Segment 3

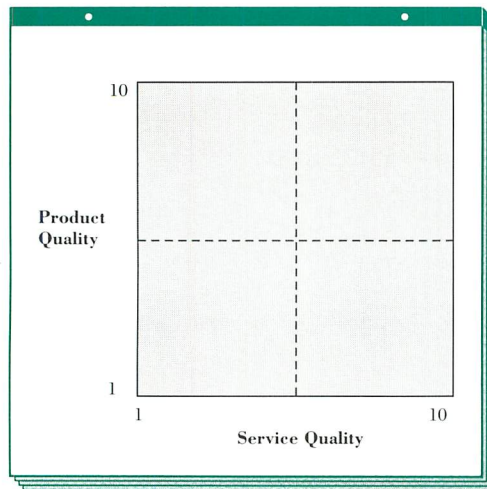
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### Reviewing the Pre-Work Assignment

### Assessing How Our Internal Customers View the Products and Services of Our Work Unit

What matters to our customers?

How are we doing in meeting those expectations?



Plot your Product-Service Quality scores according to the Facilitator's instructions.

What is the impact on our final customers' perceptions of our organization's products and services?

## Segment 3

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**Discussion Notes**      What areas should we work on?

What recommendations can we make to senior management?

# Pre-Work Assignment for Segment 4: Improving Processes to Exceed Customer Expectations

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**Purpose**

To learn to recognize how processes affect the ability to meet and exceed customers' expectations.

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**Instructions**

**Step 1:**

Choose a familiar process to investigate during this assignment. Because you will be interviewing the people who work directly with that process, you should be able to readily identify with it.

**Step 2:**

Observe the process in operation. If possible, work the process yourself.

**Step 3:**

Ask those who work the process for their ideas on making it more efficient. How would they change it?

**Notes and ideas for improving the observed process:**

## Segment 4: Improving Processes to Exceed Customer Expectations

---

### **Purpose**

- To create awareness of the processes involved in each participant's work and how those processes can be made to reflect the voice of the customer.
- To collect suggestions from employees on how to improve processes.
- To generate measures that can be used to reflect the voice of the customer in the processes.
- To report to management ideas generated for improving actual processes.

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### **Discussion Notes**

#### **Linking Customers and Processes**

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### **Videotape Segment 4**

As you watch and listen to Videotape Segment 4, use the space below to record your reactions, questions, and concerns.

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**Group Discussion     Analyzing a Work Process**

Record the results of the Pre-Work Assignment as other participants report.  
What goes wrong?

What were the suggestions from people who work on the process?

Listed below are “Ten Areas of Waste” that can make any process ineffective and inefficient. How can the process you examined be improved by eliminating or minimizing these wastes?

### Ten Areas of Waste

1. **Complexity:** Confusion, frustration, needless complex steps that waste time, money, and people’s efforts.
2. **Labor:** Unnecessary “movement” and steps by people.
3. **Overproduction:** Producing products or services beyond customers’ demand.
4. **Space:** Poor arrangement of machines, people, conveyors, warehouses, workstations.
5. **Energy:** Unproductive operations, false scale efficiencies.
6. **Defective Goods and Errors:** Mistakes, defects, inaccuracies.
7. **Materials:** Scrap, excess, raw materials.
8. **Idle Materials:** Excess inventory and people
9. **Time:** Delays, missing information, late shipments, unplanned down time.
10. **Transportation:** Movement of information, materials, people that does not add value to the service or product but does add cost.



## Pre-Work Assignment for Segment 5: Involving and Empowering People

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### Purpose

To examine the extent to which employees feel prepared and supported for implementing a quality initiative.

---

### Instructions

#### Step 1:

Identify at least three employees at different levels in the organization who are willing to answer some questions about their sense of empowerment in their work.

#### Step 2:

Use the questions provided below to interview the selected employees.

In order to get honest answers to your questions, explain that you are interviewing them as part of your seminar work and that their answers will be treated with complete confidentiality.

You may want to begin each interview by explaining that you are interested in how these employees view the organization's performance on quality, what they believe interferes with being a quality producer, and what the company should do to improve quality.

### Suggested Employee Interview Guide

1. How do you know when you are doing your job well?
2. On a scale of 1 to 10 (10 is high), how would you rate the quality produced by your work unit?
3. What were you thinking about when you answered the previous question?
4. What would you need to help improve the quality of your work?
5. What happens to employees who make mistakes?
6. How do employees really get ahead?
7. To what extent are employees willing to take risks?
8. What happens to new ideas you have?
9. What are the basic standards for doing your job?
10. How much time do you spend improving versus doing your job?
11. How well have you been trained or prepared to do your job?
12. How does your job fit into the overall direction of the organization?
13. What rewards or recognition do you get for satisfying customer needs, doing quality work, or improving processes?

## Pre-Work Assignment

## Segment 5: Involving and Empowering People

---

### **Purpose**

- To assess the extent to which human resource systems prepare people to accept and execute the customer-driven initiative.
- To explore how organizational beliefs about risk taking and empowerment affect employees' readiness to implement a quality initiative.
- To identify suggestions for management to improve participation, risk taking, and innovation.

---

### **Discussion Notes**

#### **Creating Inspired Employees**

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### **Videotape Segment 5**

As you watch and listen to Videotape Segment 5, use the space below to record your reactions, questions, and concerns.

## Segment 5

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### Discussion Notes      Exploring the Concept of Empowering People

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#### Pre-Work Assignment Discussion Notes

#### Identifying Supports and Inhibitors to Employee Readiness

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How HR Systems:

Support

Inhibit

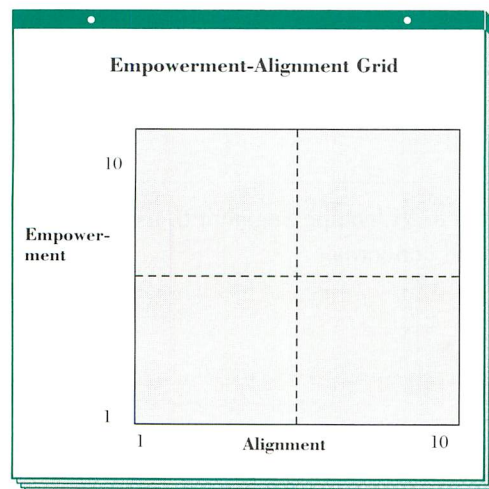
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How Belief Systems:

Support

Inhibit

Ideas for Creating Empowered Employees:



What are the implications to the organization and to individual employees of our placement on the Empowerment-Alignment Grid?

## Segment 6: Walking the Talk

---

### Purpose

- To assess how well the organization's current leadership is managing the process of becoming customer-driven.
  - To differentiate the research-based leadership principles that are most important in this organization.
  - To acknowledge the existing strengths of leaders in the organization and to recommend specific actions that can be taken by senior management to improve the overall quality improvement effort.
- 

### Discussion Notes

#### Walking the Talk

### Videotape Segment 6

As you watch and listen to Videotape Segment 6, use the space below to record your reactions, questions, and concerns.

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### Discussion Notes

#### Exploring the Concept of Leadership

## Customer-Driven Leadership Behaviors

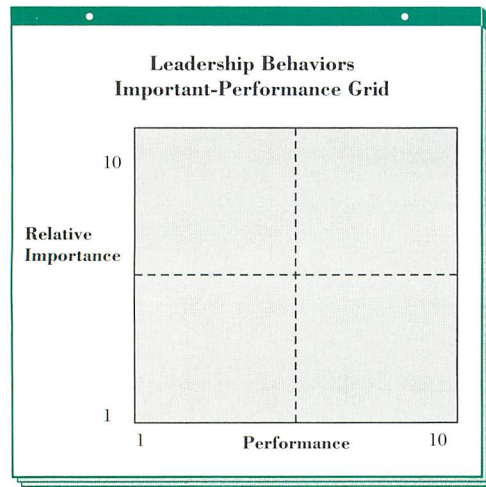
**Instructions:** Rate the extent to which you feel leaders in this organization are currently practicing these behaviors. Then, rate the importance of each behavior to becoming a customer-driven company.

	<i>Low</i>						<i>High</i>
<b>1. Champion the customer</b>							
<i>Current practice</i>	0	2	4	6	8	10	
<i>Importance</i>	0	2	4	6	8	10	
<b>2. Promote the vision</b>							
<i>Current practice</i>	0	2	4	6	8	10	
<i>Importance</i>	0	2	4	6	8	10	
<b>3. Invest in people</b>							
<i>Current practice</i>	0	2	4	6	8	10	
<i>Importance</i>	0	2	4	6	8	10	
<b>4. Make teams work</b>							
<i>Current practice</i>	0	2	4	6	8	10	
<i>Importance</i>	0	2	4	6	8	10	
<b>5. Become “students for life”</b>							
<i>Current practice</i>	0	2	4	6	8	10	
<i>Importance</i>	0	2	4	6	8	10	
<b>6. Stay the course</b>							
<i>Current practice</i>	0	2	4	6	8	10	
<i>Importance</i>	0	2	4	6	8	10	
<b>7. Live the organization’s purpose</b>							
<i>Current practice</i>	0	2	4	6	8	10	
<i>Importance</i>	0	2	4	6	8	10	

## Segment 6

List Leadership Strengths:

List Priority Areas for Attention:



Now, along with the Facilitator, plot the group's ratings on the Leadership Behaviors Importance-Performance Grid.



## Segment 7: Clearing the Hurdles

---

### **Purpose**

- To identify common hurdles in implementation of successful quality initiatives.
- To develop strategies for avoiding common hurdles and to correct problems that may emerge during the implementation of a quality initiative.
- To recommend specific actions senior management can take to anticipate and avoid common hurdles.

---

### **Discussion Notes**

#### **Clearing the Hurdles**

What gets (or will get) in the way of the changes necessary to become customer-driven?

---

### **Videotape Segment 7**

As you watch and listen to Videotape Segment 7, use the space below to record your reactions, questions, and concerns.

Discussion Notes      Exploring the Concept of Clearing the Hurdles

**Common Hurdles To Customer-Driven Quality**

**Instructions:** Rate the extent to which each hurdle is currently having or could potentially have an impact on this organization’s customer-driven quality initiative. Be prepared to discuss your ratings in class.

		<i>Low</i>					<i>High</i>
<hr/>							
<b>1. Inadequate leadership from the top</b>							
	<i>Impact</i>	0	2	4	6	8	10
<hr/>							
<b>2. Functional warfare</b>							
	<i>Impact</i>	0	2	4	6	8	10
<hr/>							
<b>3. Quality treated as a “program”</b>							
	<i>Impact</i>	0	2	4	6	8	10
<hr/>							
<b>4. Untrained people</b>							
	<i>Impact</i>	0	2	4	6	8	10
<hr/>							
<b>5. Fear</b>							
	<i>Impact</i>	0	2	4	6	8	10

---

**Discussion Notes**

**Recommendations for Removing/Anticipating Hurdles**

Things We Can Do:

Things Senior Management Can Do:

## Segment 8: Conclusion

---

**Purpose**

- To develop some final thoughts about customer-driven quality and its role in this organization.
- To summarize for senior management the learnings gained from the *Customer-Driven Quality* Video Seminar and the recommendations offered in our Report to Management.

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**Videotape  
Segment 8**

As you watch and listen to Videotape Segment 8, use the space below to record your reactions, questions, and concerns.

## Your Personal Agenda

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As you complete each segment of the Video Seminar, you will have an opportunity to use this portion of your *Participant's Manual* to begin to apply the learnings to your own job. You will find specific instructions for capturing concepts and ideas.

After you have completed the Video Seminar and returned to your usual routine, you might find it interesting and useful to check these pages from time to time to assess the extent to which you are actually using customer-driven quality concepts.

# Segment 1: Introduction and Overview— Personal Learning Agenda

For each segment of the *Customer-Driven Quality* Video Seminar, indicate what you would like to focus on, either to improve personal understanding or to explore new concepts. Keep these goals in mind as you examine all the aspects of customer-driven quality.

---

**Seminar Segment**

**Topics to Learn More About**

---

**Establishing Direction  
and Alignment**

**Listening to the Voice of  
the Customer**

**Improving Processes to Exceed  
Customer Expectations**

**Involving and Empowering  
People**

**Walking The Talk**

**Clearing The Hurdles**

**Other personal goals for this Video Seminar:**

## Segment 2: Establishing Direction and Alignment—Personal Agenda

What does becoming customer-driven mean to you? It is important for individuals as well as organizations to have a sense of direction, vision, and values that reflect how they will behave and make decisions.

---

**Instructions**

Use the space below to develop a direction, vision statement, and values for yourself. (Refer back to Segment 2 in this manual for guidelines.)

**A personal direction, vision statement, and values:**

## Segment 3: Listening to the Voice of the Customer—Personal Agenda

You can personally make yourself responsible for listening to the voice of the customer for your work group. The first step in “drawing closer” to the customer is deciding how to collect data using a reliable and efficient method or combination of methods.

---

**Instructions** From the list of customer data collection methods below, select a method or combination of methods that will help you better understand on an ongoing basis customer expectations for your work unit.

---

<b>Customer Data Collection Methods</b>	<b>Advantages</b>	<b>Disadvantages</b>
---	-------------------	----------------------

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**Focus Groups**

**Manager Visits to Customers**

**Employee Visits to Customers**

**Using Customer Interface People to Collect Data**

**Creating a Customer Experience for Your Work Unit People**

**Establishing Customer Councils**

**Post-Purchase Assessments**

**Customer Evaluation Meetings**



## Segment 4: Improving Processes to Exceed Customer Expectations—Personal Agenda

---

**Instructions**

Identify how a source of waste can be reduced or eliminated in a process for which you are personally accountable.

---

<b>Area of Waste</b>	<b>Action Steps</b>	<b>Review Date</b>	<b>Resources Needed</b>	<b>Expected Benefits</b>
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# Segment 5: Involving and Empowering People—Personal Agenda

Review the ideas generated in the group discussion for creating more empowered employees. Develop some practical management actions you can implement immediately and in the near future to support risk taking, innovation, and participation.

---

Area	Do Now	Do Later
------	--------	----------

---

Clarify standards

Develop skills and knowledge

Reward and recognize performance

Encourage risk taking and innovation

Encourage participation

## Segment 6: Walking The Talk— Personal Agenda

Rate yourself on each of the seven leadership behaviors, trying to see yourself as those around you do.

---

### Customer-Driven Leadership Behaviors

	<i>Low</i>						<i>High</i>
<b>1. Champion the customer</b>							
<i>Current practice</i>	0	2	4	6	8	10	
<b>2. Promote the vision</b>							
<i>Current practice</i>	0	2	4	6	8	10	
<b>3. Invest in people</b>							
<i>Current practice</i>	0	2	4	6	8	10	
<b>4. Make teams work</b>							
<i>Current practice</i>	0	2	4	6	8	10	
<b>5. Become “students for life”</b>							
<i>Current practice</i>	0	2	4	6	8	10	
<b>6. Stay the course</b>							
<i>Current practice</i>	0	2	4	6	8	10	
<b>7. Live the organization’s purpose</b>							
<i>Current practice</i>	0	2	4	6	8	10	

## Segment 6: Personal Agenda

Capture ideas for scoring higher on each customer-driven leadership behavior.

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### Customer-Driven Leadership Behaviors

### Ideas for Raising Scores

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1. Champion the customer
2. Promote the vision
3. Invest in people
4. Make teams work
5. Become “students for life”
6. Stay the course
7. Live the organization’s purpose

## Segment 7: Clearing The Hurdles— Personal Agenda

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**Instructions**

Develop an Action Plan for anticipating or removing hurdles to customer-driven quality in your area of responsibility. Specify three hurdles for which you can develop removal goals, action steps required, dates for progress checks, resources you will need, and the benefits you expect.

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<b>Hurdle</b>	<b>Action Steps for Removal</b>	<b>Review Date</b>	<b>Resources Needed</b>	<b>Expected Benefits</b>
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## Suggested Reading

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William E. Deming, *Out of the Crisis* (Cambridge, MA: MIT Center for Advanced Engineering Studies, 1986)

David A. Garvin, *Managing Quality* (New York: Free Press, 1988)

H. James Harrington, *The Improvement Process: How America's Leading Companies Improve Quality* (New York: McGraw Hill, 1987)

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Kaoru Ishikawa, *Guide To Quality Control* (White Plains, NY: Quality Resources, 1986)

J.M. Juran, *Juran on Leadership for Quality: An Executive Handbook* (New York: Free Press, 1989)

Peter C. Reid, *Well Made in America: Lesson from Harley Davidson on Being the Best* (New York: McGraw Hill, 1990)

Carl Sewell and Paul B. Brown, *Customers for Life* (New York: Doubleday, 1990)