

# THE ASSESSMENT METHODOLOGIES PTEL, ADRI AND CAE – THREE METHODOLOGIES FOR COORDINATING THE EFFORTS TO IMPROVE THE ORGANIZATIONAL PROCESSES TO ACHIEVE EXCELLENCE

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## Abstract

*In the paper “The Assessment Methodologies PTEL, ADRI and CAE – Three Methodologies for Coordinating the Efforts to Improve the Organizational Processes to Achieve Excellence” the authors present the basic features of the assessment methodologies PTEL, ADRI and CAE that are designed to coordinate the efforts to improve the organizational processes in order to achieve excellence.*

*In the first part of the paper (the introduction of the paper), the authors present the general background concerning the performance of management business processes and the importance of achieving excellence and furthermore correctly assessing/evaluating it. Aspects such as quality, quality control, quality assurance, performance and excellence are brought into discussion in the context generated by globalization, new technologies and new business models. Moreover, aspects regarding the methods employed to ensure the quality, maintaining it and continuous improvements, as well as total quality management, are also main pillars of this current research.*

*In the content of the paper (the assessment methodologies PTEL, ADRI and CAE – as methodologies for coordinating the efforts to improve the organizational processes to achieve excellence), the authors describe the characteristics of the assessment methodologies PTEL, ADRI and CAE from a theoretical point of view.*

**Keywords:** *business process management, assessment methodologies, PTEL, ADRI, CAE, organizational processes, quality, quality control, performance, excellence, globalization.*

## 1. Introduction

The paper entitled “The Assessment Methodologies PTEL, ADRI and CAE – Three Methodologies for Coordinating the Efforts to Improve the Organizational Processes to Achieve Excellence” is dedicated to theoretical contributions to knowledge development in modeling business performance in the XXI century in the context of the approach to excellence. The paper presents in a concise manner some theoretical contributions to the knowledge development in modelling business performance in the XXI century in the context of the approach to excellence and describes, from a theoretical point of view, the assessment methodologies PTEL, ADRI and CAE, which are three methodologies for coordinating the efforts to improve the organizational processes to achieve excellence.

The quality of products or services or their management, is a decisive factor in the activity of any society whose dynamic is changing and developing, under any market economy. The concept of “quality”, first found in Aristotle’s philosophical system, is of great importance in our lives of all, quality is a powerful strategic management for global organizations that determines the highest degree measure competitiveness of products or service

organizations, companies or firms both domestically and internationally.

In terms of the approach and quality management systems, identify over time, evolving carried out in several stages, each with specific characteristics: quality inspection stage, stage quality control by statistical methods, step to ensure quality, quality management stage, the stage of total quality excellence.

The new approach takes into account the quality control by focusing specifically on preventing and eliminating defects being applied in all areas by all parties:

- Quality control of the product design begins and ends with the delivery of its client;
- Control is performed both specialized inspection staff and by each person involved in the manufacturing or service provision;
- To achieve the goals of “quality assurance” is necessary to involve all departments of the company.

In this new context it is necessary to conduct periodic audits to analyse the observance of the quality system adopted his efficiency, the need for change, able to increase the quality and competitiveness. Since this is a system of relations between the coordinating and his subordinates, so between people, quality achievements in this field and effects achieved will create new end features including managers and work climate created between team members.

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In the current economic context, marked by the growing importance of quality as a determinant of the competitiveness of organizations, there is a concern for both febrile production units and those providing services, the use of new techniques and tools applicable to quality management, the main purpose to continuously improve performance in order to achieve a higher degree of satisfaction and complex customer requirements, with maximum efficiency and effectiveness.

Quality and excellence are relative and subjective values to which it tends, though not always successfully. Quality, defined in relation to the cultural, economic and social needs, expectations and requirements of customers in science and technology in continuous progress, is developing permanently.

The methods employed to ensure the quality, maintaining it and continuous improvement, total quality management meet.

Total quality management, managerial concept that takes shape, centres its activities on quality and full involvement, awareness and responsibility of all employees. TQM concept consisting of a set of complex processes, aims to continuously improve product and service quality, customer satisfaction purposes. Quality assurance system has been the subject of international standards ISO 9000 which were taken in Romanian standardization. In the years 2000 - 2001 appeared in the new version of ISO 9000 which covers quality management system, also taken in Romanian standardization.

The elements with major impact on the modern approach to quality strategy found in three elements that have brought significant changes in the modern era, internationally:

- Globalization of markets in which we approach most of the true meaning of the phrase: "Our customer, our master", while the customer requirements may seem exaggerated sometimes unexpectedly;
- New technology, which is in a boom, driven by a variety of factors, including a role they have e-commerce and e-Business to Business market;
- New business models characterized by excellence and transparency strongly supported the crucial role they have resources "intangible" (man-pawn mainly found in relationships with customers, partners and suppliers, intellectual capital, technology, know-how built the products, technologies, manufacturing or other economic links in the chain, top management).

The fourth stage of quality, total quality management defines the framework for introducing new concepts such as "zero defects", "quality circles", including the Japanese principle of "CWQC - Company Wide Quality Control" Kaoru Ishikawa defined meaning to "control the quality of enterprise-wide".

The road to total quality excellence organizations must continuously watch:

a) Ensuring full customer satisfaction (requirements, needs, expectations), depending on the type of products and / or services they perform and / or provides each department, department or functional structure of the organization;

b) Regular analysis within each department, department or functional structures, to:

- results and the state in which the plans for achieving performance indicators established;
- flexible and rapid feedback to requests and events, regardless of when they are asked by customers;
- risks related products and / or services performed and / or supplied;
- costs due to effective and efficient use of resources;

c) Emphasis on improving processes that can lead to the best results;

d) Obtain advantages to maintain the competitiveness by improving organizational capabilities;

e) Motivating employees to ensure their active participation and involvement to achieve organizational goals and objectives proposed;

f) Ensuring and maintaining the trust of all stakeholders in enhancing organizational effectiveness and efficiency.

The key concepts of TQM are "excellent", "exceeding customer expectations", "zero defects" total involvement provided by the organization and management primarily of its elite and collaborating organizations.

International Organization for Standardization (ISO - International Organization for Standardization) 9000 series of standards adopted on quality management in response to increased market globalization challenges, the result of a long process of evolution, which began in the US Being generally accepted in 1950, the results of ISO take the form of international standards, guidelines and other similar documents whose objective involves the development of standardization and facilitating the international exchange of goods and services. Initial regulations aimed at improving the performance quality of organizations, then complemented by a series of quality assurance standards, including those corresponding industries, thus extending gradually their range of applicability, culminating in the adoption in 1987 of a series of ISO 9000 standard is applicable to this form especially by organizations in the field of production. Subsequently, to make it applicable not only in production organizations, the standard was revised and officially adopted in 1994 by the International Organization for Standardization.

These standards and regulations are widely used in the international market, in accordance with the technical requirements that meet standards of quality, safety, hygiene and environmental protection, deadlines, costs and requirements on the content of social elements.

The standards have come to be regarded as frequently as practical tools that allow addressing those urgent challenges which the international community must face.

The public or private sector managers have come to refer spot on the application of international standards ISO in organizations they represent, and this is a major asset for attracting, maintaining and winning new customers, while focusing on improving their work.

To excel in business means being better than the other competitors, particularly through performance management, financial, quality, thus highlighting both the situation of an organization performing the superlative way and all the factors due to which it has come to excel. "Business excellence" highlights a complex system of performance appraisal which gives the organization a maximum level of credibility in the market. Evaluated and compared with well-defined benchmarks, the performance achieved by an organization can determine a "business excellence", its specific. Moreover, to achieve public recognition of the excellence award is made by the quality attributed to the fulfillment of a complex set of criteria and performance evaluations conducted in the most discerning and transparent way possible.

All of criteria and sub-criteria global reference that can quantify overall performance of an organization, consisting of both the drivers and the practical results thereof, may obtain coveted ensure quality, which is the attribute model of business excellence.

There are many countries that have developed over time through sustained efforts, their own models of excellence, then using them as structures in a process of assessing and recognizing performance in organizations through special programs providing awards in recognition of the value and performance.

## **2. The Assessment Methodology PTEL R – a theoretical approach**

J. Naisbitt (Naisbitt, John, 1982) predicted, more than three decades ago, the development of a new paradigm of thinking imposed by globalization. The management science, in front of many challenges such as the globalization of business in a galloping pace, constantly raises issues of adaptation of organizations in terms of the external environment, the global market is found most often in the form of a system of interdependent markets characterized by competition closer every day.

In the current situation, organizations cannot take decisions independently, as they did in the last few decades, which puts organizations in a position to reconsider priorities if successful management intend, characterized by excellence, is expressly preoccupied respond swiftly to customer requirements vis-à-vis: delivering quality products and services in a timely manner, ensuring their high performance, coming up

with tempting offers at prices or rates, providing a wide range of types of buyers.

Given the information revolution that allowed the transition from classical to integrate production output by computer (CIM - Computer Integrated Manufacturing), management companies had to develop competitive strategies increasingly complex by: tracking multiple aspects regarding the quality of products/services delivery their timely adaptation to consumer needs, low cost; simultaneous tracking of multiple market segments; following the development of new products.

It should be noted that between globalization and enterprise activity tightly reflected including management activities need to adapt the current situation that arises more often focus on driving business networks, the dissolution of the company functions on loyalty management and competition, which takes extremely varied forms.

In the current economy, we note the decisive role of the globalization process, supported by three significant factors influence resizing markets, deregulation, and power organizations to integrate activities worldwide. Specifically:

a) The area of international trade was essentially scaled by integrating new states in Latin America, Central and Eastern Europe and in Southeast Asia;

b) There have been taken action on de-regulation, which provides trade facilitation, with positive consequences, particularly visible in services;

c) By globalization many organizations have proven competence to integrate their activities, particularly research and development, supply, production and marketing worldwide.

As a result of globalization of markets and businesses, the globalization of competition has made its presence felt acutely. Therefore, the consequences of success or failure in competitive national market will not long be limited to that country, but have an important impact on the overall competitiveness of the company, being felt worldwide.

Rush globalization results in an inevitable interpenetration of national economies recovered in the growing importance of the role of trade, investment and foreign capital in gross domestic product (GDP).

Companies that do not meet the criteria imposed by the accelerating pace of globalization, it is conceivable to resist. Conditions in this context are closely related: who is stronger stand, who is faster, more creative, who face in the best manner competition. Challenges and responsibilities are so high, more so in this context that any defect, however small, in a country allows a link in the chain weakening economic interdependence, which in turn may cause a blockage of the entire gear.

As a conclusion to briefly review past issues, businesses today operate in an environment of competition at its best; the "speed" leads posted at all levels, distinguishing between those who adapt and those who fail. We are dealing with borderline

situations where the speed with which firms fail to develop, promote and capitalize on their new products and services is a critical element of competitiveness (Chen, J.M., Tsou, J.C., 2003).

In addition, the life cycle of the supply of products and services is becoming less (Gunasekaran, 2002), which translates into shortening product life cycle, which can seriously affect the company that has provided a relatively reduced to recoup the investment (Seghezzi, 2001).

In conditions of fierce competition in the market, the company is continuously subject to the need for innovation. There are situations where the company is located in the state in which you have to resort to radical changes in the supply of products and services to succeed in achieving superior financial performance (indicators are taken into consideration such as the rate of profit, return on investment, and net updated financial internal rate of return). Moreover, competitive advantage is provided and the ability of the company to be the first to bring to market the product or service requested, subject to the qualification and quality expected (Cole, 2002).

The result of these challenges can have unpleasant consequences if an effort to achieve maximum performance is maintained and correlated.

The effects imposed by the "speed" with which we have achieved "any", "however" significantly reduce: the time that would be spent on new product development, production and delivery times, the possibility that all generated by new circumstances to cause fewer errors or non-compliance, for the supply of goods or services "anyway" is excluded in achieving performance.

This dynamic environment subject to such constraints affecting the efficiency of type PDCA methodology developed to support continuous improvement effort, not to allow systematic completion of the four steps necessary steps. The PDCA assessment methodology, although a very systematic approach, is time and resources consuming. The time is compressed so much that PDCA is no longer able to ensure accuracy. We are faced with a conflict between accuracy even tackling and time in which to reach a conclusion.

Therefore, from a methodological point of view, should be identified new solutions able to solve the conflict without complications or major shortcomings.

Altshuller (Altshuller, 2000) propose to solve this conflict the method TRIZ ([www.triz.org](http://www.triz.org)) that would allow innovative use of three principles: 1) conducting preliminary actions; 2) replacement of components deemed rigid with others characterized by flexibility; 3) more efficient use of the possible "downtime".

Based on these three new principles, Cole (2002) proposes a new methodology to improve adapted to the new environment defined by dynamism and uncertainty: PTEL, from the phrase: "Probe and learn as alternative approach" – "Probe/Probe and learn as

alternative approach". PTEL methodology acronym comes from the initials of the four main phases that compose it: Tests - Test - Evaluate - Learn - Refine.

We recognize the crucial steps in the methodology of PDCA methodology, but carried out in an accelerated pace, with modifications adapted to the "speed" facing humanity globally.

"Probe/Probe and learn" is essentially an accelerated plan PDCA cycle. Unlike the conventional PDCA, probe/prove and learning is a process in which we are confronted with many difficulties on planning, plus those from the stages of implementation and verification. "Probe and learn" is a process of renewal being totally consistent with the ultimate goal of continuous improvement. Rapid learning and accelerate product development is a first requirement in this era in which firms operate increasingly more Internet. Briefly, learning and the process are two of the continuous improvement principles (Cole, 2002).

If planning phase (P) is allocated a minimum of time, execution stage (Do) is allocated a time almost exaggerated somewhat justified by the fact that at this stage develop a "prototype" of the system, tested and evaluated later. Based on lessons learned from the errors identified in the prototype, the process is improved. We notice that PTEL methodology is based on rapid learning, first of errors identified during the evaluation process which takes place in late stages of execution and, secondly, the results obtained by applying iterative methodology.

PTEL methodology assumes that generating error is part of the learning process. Errors are sometimes beneficial, should not always be avoided or suppressed, but rather minimized by careful management of probing and learning processes. Companies should learn to manage errors in the future this step is an important indicator of their success. Contributing to identify errors "useful" without error "enemy", companies enrich their experience and allow progress.

PDCA is a methodology of continuous improvement, innovation PTEL is continuous methodology (Cole, 2002), which is recommended to be used in companies that have already implemented the EFQM model.

PTEL methodology being developed exclusively for accelerated dynamic processes that involve a high level of innovation is not yet sufficiently complete and tidy and is therefore less represented. In conclusion for a highly dynamic process is recommended PTEL methodology.

When it is considered that the process proves mature enough, it is preferable that the methodology to be replaced PTEL FOCUS-PDCA methodology.

### 3. The Assessment Methodology ADRI – a theoretical approach

Organizational performance can be evaluated using size: approach, implementation, results and

improvement, based on which defined methodology known under the acronym ADRI being used so MBNQA (2006, Criteria for Performance Excellence, Baldrige National Quality Program) American model of organizational excellence and the Australian model of organizational excellence ABEF (2012, Australian Business Excellence Awards 2005, Standards Australia International Ltd.). Acronym ADRI methodology for continuous improvement of organizational performance is named after the initials that define the process: Addresses - Conducting (Implements) - measure results - Improves (2012, Australian Business Excellence Awards 2005, Standards Australia International Ltd.).

ADRI assessment methodology is practical dimensions to browse the steps of: approach, implementation approach (deployment), assessment of effectiveness (measurement results) and improving the approach in all aspects of the organization, through careful examination of each element, trying to find answer appropriate questions each stage:

**A. Approach – “thinking and planning”:**

- What wants to achieve for that element - that is the intention had?
- What goals have been set?
- What strategies, structures and processes have been developed to achieve the intended intention and why would they be chosen?
- What performance indicators, quantitative and qualitative, were designed to track progress?
- How to approach aligns with the principles of Business Excellence model promoted by ABEF or MBNQA?

**B. Conducting (Implementation) – “implement and make”:**

- How were these strategies, structures and processes put into practice?
- How is their implementation throughout the organization?
- To what extent were accepted and incorporated as part of normal operations?
- How to approach aligns with the principles of Business Excellence model promoted by ABEF or MBNQA?

**C. Results (measurement results) – “monitoring and evaluation”:**

- What are the trends of performance indicators for this "product / service"?
- How to compare these results with the best known performance?
- What is how to measure and monitor the results of the principles of Business Excellence model promoted by ABEF or MBNQA?
- To what extent these results can be an indicator of performance for the entire organization?
- How do we know that these results lead to a correct approach and conduct?
- What can be communicated or interpreted and who can use these results?

**D. Improvement – “Learning and Adaptation”**

- What is the process of analyzing opportunities and that is the effectiveness of the approach and its implementation for “product/service” respectively?
- How to use the results for “product/service” respectively?
- What were the elements learned and to what extent the approach used to improve learning and deployment of business processes?
- How to approach aligns with the principles of Business Excellence model promoted by ABEF or MBNQA?

**4. The Assessment Methodology CAE – a theoretical approach**

The Canadian model of organizational excellence CAE proposes its own methodology to improve processes associated (Vokurka, R.J., Stading, G.L., Brazeal, J., 2000), which can be regarded like a route to be traveled step by step, the target being represented by achieving excellence in each process or activities addressed.

The CAE methodology as described by Vokurka, comprising in the cycle to improve the process, ten stages:

- The first step is to establish principles of quality. Once established, quality principles will be made known to all parties directly or indirectly concerned, proceedings having their promotion.
- The second stage begins with a review of criteria for measuring the quality of ongoing and applied the necessary changes, if any.
- In the third stage are tests that measure the quality performance in practice of the process at that time considered a “milestone”. Based on the findings will be made useful conclusions for the improvement plan.
- The fourth step is important in turn, by the fact that now the improvement plan is developed.
- The fifth step involves spreading the message about the quality that emerges from the improvement plan outlined. Important in this stage is that everyone involved in the process to be put in issue the objectives set, you must accept.
- The sixth stage involves the implementation of the improvement plan.
- The seventh step is to carefully monitor how responsible is implemented the improvement plan.
- Eighth stage is one in which the retesting quality, verify the progress.
- A new phase is to identify successes, including the conclusions made in the previous step, the main purpose being to determine a performance reference standard that is found which subsequently will need to be maintained.
- Any vulnerability surprised, is a weak point in the process chain link, so that necessary corrective plan defines the following as the last step, tenth, if necessary improvements to resume the cycle, but based on another level, maintaining permanent

attention to progress through the continued close monitoring quality at each stage.

The real concern is not confined solely to maintain performance achieved, but the continuous improvement process that repeats the cycle.

### 3. Conclusions

In order to resume the main ideas discussed from a theoretical point of view in our current research, we can state the following elements:

#### A. The assessment methodology PTELR:

- PTELR methodology assumes that generating error is part of the learning process.
- Errors are sometimes beneficial, should not always be avoided or suppressed, but rather minimized by careful management of probing and learning processes.
- Companies should learn to manage errors in the future this step is an important indicator of their success. Contributing to identify errors “useful” without error “enemy”, companies enrich their experience and allow progress.
- PTELR is continuous methodology, which is recommended to be used in companies that have already implemented the EFQM model.
- PTELR methodology, being developed exclusively for accelerated dynamic processes that involve, a high level of innovation is not yet sufficiently complete and tidy and is therefore less represented. In conclusion for a highly dynamic process is recommended PTELR methodology.

#### B. The assessment methodology ADRI:

- The organizational performance can be evaluated using size: approach, implementation, results and improvement, based on which defined methodology known under the acronym ADRI being used so MBNQA American model of organizational excellence and the Australian model of organizational

excellence ABEF. Acronym ADRI methodology for continuous improvement of organizational performance is named after the initials that define the process: Addresses - Conducting (Implements) - measure results - Improves.

- ADRI assessment methodology is practical dimensions to browse the steps of: approach, implementation approach (deployment), assessment of effectiveness (measurement results) and improving the approach in all aspects of the organization, through careful examination of each element, trying to find answer appropriate questions each stage.

#### C. The assessment methodology CAE:

- The Canadian organizational excellence proposes its own methodology associated CAE process improvement that can be seen like a route to be travelled step by step, the target being represented by achieving excellence in each process or activities addressed.
- Any vulnerability surprised, is a weak point in the process chain link, so that necessary corrective plan defines the following as the last step, tenth, if necessary improvements to resume the cycle, but based on another level, keeping the attention and careful progress through continuous quality monitoring at each stage. The real concern is not confined solely to maintain performance achieved, but the continuous improvement process that repeats the cycle.

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