

The EFQM Levels of Excellence Scheme

‘Committed to Excellence’



ACTION PLAN TEMPLATE FOR IMPROVEMENT PROJECTS

<<NAME OF ORGANISATION>>

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ORGANISATION DETAILS	
Name of Organisation	
Address	
Contact Person	
Telephone Number	
Fax Number	
E-mail Address	
Planned date for Validation visit (usually 6 – 9 months after formal application)	

Please refer to the *Guide for Applicants* for advice on how to complete this plan

Please note:

Your Action Plan should:

- Be in English
- Have numbered pages
- Not exceed 15 pages (including this page)
- It should be typed and the font size must not be less than 10
- Retain the same structure of the tables and margins provided

In case you have questions, or require assistance with completing your template, please contact:

EFQM Levels of Excellence Team Leader: +32 2 775 3538

Part I: Information about your Self Assessment (SA)

<p>Date of your Self-Assessment</p>	
<p>Did you use an External Facilitator?</p>	<p><input type="checkbox"/> Yes <input type="checkbox"/> No</p>
<p>Method of Assessment</p>	<p>Briefly describe the</p> <ul style="list-style-type: none"> • method used for your Self Assessment • how the SA was conducted • who participated at the SA exercise
<p>What were the lessons learnt which could help to improve your approach to SA.</p>	

Part 2a: The outcome of your Self-Assessment – What Strengths were identified?

List below 2 of the most relevant strengths based on the EFQM Excellence Model criterion below.

	Model Criterion		Strengths
ENABLER	Leadership	1.1	
		1.2	
	Policy and Strategy	2.1	
		2.2	
	People	3.1	
		3.2	
	Partnerships and Resources	4.1	
		4.2	
	Processes	5.1	
		5.2	
RESULTS	Customer Results	6.1	
		6.2	
	People Results	7.1	
		7.2	
	Society Results	8.1	
		8.2	
	Key Performance Results	9.1	
		9.2	



Part 2b: The outcome of your Self-Assessment – What Areas for Improvement were identified?

List below 2 of the most relevant Areas for Improvement based on the EFQM Excellence Model criterion below.

	Model Criterion		Areas for Improvement
ENABLER	Leadership	1.1	
		1.2	
	Policy and Strategy	2.1	
		2.2	
	People	3.1	
		3.2	
	Partnerships and Resources	4.1	
		4.2	
	Processes	5.1	
		5.2	
RESULTS	Customer Results	6.1	
		6.2	
	People Results	7.1	
		7.2	
	Society Results	8.1	
		8.2	
	Key Performance Results	9.1	
		9.2	

Part 3: Prioritising your areas for improvement - How will you determine the importance of an improvement project?

You may use any method you are comfortable with to prioritise your Areas for Improvement. You are required to briefly describe how you do it and the output it generates. The Applicant Guide provides you with ideas on how this can be done.

Briefly describe your prioritisation criteria and how you prioritised your Areas for Improvement:

Outcome: A list of your Top 3 improvement projects.

	Improvement Projects
Project 1	Title:
Project 2	Title:
Project 3	Title:

Part 4: Impact and relevance of your improvement projects

Projects	How is it relevant to your organisation and how does it serve your strategy?	What impact will it have on your Organisational Goals, Performance Results or Business Plan?	How does it contribute to or support other organisational Approaches?
Project 1	•	•	•
Project 2	•	•	•
Project 3	•	•	•

Part 5: Planning of Improvement Projects

A	B	C	D	E												F
Project	Key Milestones	Project Owner	Expected completion date	Gantt Chart of Activities												Status
				J	F	M	A	M	J	J	A	S	O	N	D	
<i>1</i>	<<Name of the Project>>	XXX	XXXX													Overall status
	I.															
	II.															
	III.															
	IV.															
2	<<Name of the Project>>	XXX	XXXX													
	I.															
	II.															
	III.															
3	<<Name of the Project>>	XXX	XXXX													
	I.															
	II.															
	III.															
	IV.															

Status



Red = deployment not on target

Amber = not yet due to start/in progress and deployment on target

Green = completed

Part 6: Improvement Project I

A	Title:	
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B	Owner of the Action:	
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C	Date for Full Deployment:	
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D	Main Model Criterion impacted:	
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E	Current Status as of (insert month and year):	
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Red ●	Amber ●	Green ●

Project Description

F RESULTS What measures and targets will you use to ensure the improvement has been fully deployed?	
What measures and targets will you use to ensure the improvement has been successful?	

G	APPROACH Describe the project and why it is necessary
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Part 6: Improvement Project I (Continued)

H DEPLOYMENT Describe <ul style="list-style-type: none">• How it will be implemented• Where it will be implemented• Who contributes to the implementation	
I ASSESSMENT AND REVIEW Describe how you will <ul style="list-style-type: none">• Monitor and record progress against plan• Identify and record learning points• Monitor progress against measures listed in I – Result	

Part 6: Improvement Project 2

A	Title:	
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B	Owner of the Action:	
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C	Date for Full Deployment:	
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D	Main Model Criterion impacted:	
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E	Current Status as of (insert month and year):	
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Red ●	Amber ●	Green ●

Project Description

F RESULTS What measures and targets will you use to ensure the improvement has been fully deployed?	
What measures and targets will you use to ensure the improvement has been successful?	

G	APPROACH Describe the project and why it is necessary	
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Part 6: Improvement Project 2 (Continued)

H DEPLOYMENT Describe <ul style="list-style-type: none">• How it will be implemented• Where it will be implemented• Who contributes to the implementation	
I ASSESSMENT AND REVIEW Describe how you will <ul style="list-style-type: none">• Monitor and record progress against plan• Identify and record learning points• Monitor progress against measures listed in I – Result	

Part 6: Improvement Project 3

A	Title:
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B	Owner of the Action:
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C	Date for Full Deployment:
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D	Main Model Criterion impacted:
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E	Current Status as of (insert month and year):
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Red ●	Amber ●	Green ●

Project Description

F	RESULTS What measures and targets will you use to ensure the improvement has been fully deployed?
	What measures and targets will you use to ensure the improvement has been successful?

G	APPROACH Describe the project and why it is necessary

Part 6: Improvement Project 3 (Continued)

<p>H DEPLOYMENT</p> <p>Describe</p> <ul style="list-style-type: none">• How it will be implemented• Where it will be implemented• Who contributes to the implementation	
<p>I ASSESSMENT AND REVIEW</p> <p>Describe how you will</p> <ul style="list-style-type: none">• Monitor and record progress against plan• Identify and record learning points• Monitor progress against measures listed in I – Result	