

PREPARING FOR A **BMP** SURVEY... OR...

“What to do before
the **BMP** Survey Team arrives”



Foreword

The mission of the **Best Manufacturing Practices, BMP**, program is to validate, document, publish, and share best practices that are being used throughout industry, government, and academia.

To accomplish this mission, the **BMP** program conducts on-site, voluntary surveys of organizations that wish to participate by having their practices evaluated, documented, and published by an independent team of experts. These surveys provide the participating organization with valuable benchmarking information at no cost, as well as a greater visibility of their organization throughout the country.

By hosting this survey of your organization, you become a valuable partner with the **BMP** program and join the growing ranks of many others who have elected to take advantage of the benefits and relationships that the **BMP** program has to offer.

In memory of Will

Table of Contents

<i>PREPARING FOR A BMP SURVEY</i>	1
Developing a List of Presentations	2
Number of Topics	2
Getting the Word Out	3
Informing the Presenters	3
Hosting the Pre-Survey Visit	4
Pre-Survey Visit Agenda	5
Scheduling Presentations	6
Typical One Day Schedule For One Team	7
<i>SURVEY TEAM REQUIREMENTS</i>	8
Information Package	9
Security Clearance Information	9
Individual Team Facilitators	9
On-Site Facility Requirements	9
<i>ACTIVITIES DURING THE SURVEY</i>	10
Typical Survey Agenda	11
Presentations During the Survey	12
Staying on Track	13
Adding Additional Presentations	13
Copying the Draft Survey Report	14
Conducting the Survey Debrief	14

Table of Contents (Continued)

<i>POST SURVEY ACTIONS</i>	15
Reviewing the Survey Draft Report	16
Publishing the Survey Report	16
Sharing the Results	17
<i>ACKNOWLEDGEMENT</i>	18

PREPARING FOR A **BMP** SURVEY



This booklet is your guide to ensure a successful **BMP** survey of your organization. Should you have any questions or require more information, contact your **BMP** Survey Team Chairman, Satellite Center Representative, or the **BMP** Center of Excellence.

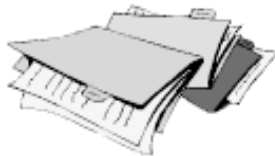
Remember — this is your survey. You decide what practices you want the survey team to see and report on. The role of the **BMP** survey team is to document, validate, and publish a survey report based on those practices. The team will also provide you with feedback on similar applications being used throughout the U.S. industrial base.

Developing a List of Presentations . . .



The first step in preparing for a successful **BMP** survey is to develop a list of items that you do well and that you want the survey team to evaluate. This list should not include anything you do not want published in the final report. Remember, this is your survey and you control what is documented. Each item on the list should include a brief description of the process or practice. This information will help the **BMP** Survey Team Chairman select knowledgeable team members with experience in the areas being presented.

Number of Topics . . .



The typical number of topics presented during a **BMP** survey range from a minimum of 15 to over 100, depending on the size of the organization. The Survey Team Chairman will review and discuss your list of topics with you during the pre-survey visit to your organization. The number and size of the survey teams required for your survey will be determined by the Survey Team Chairman based on the number of topics presented during the pre-survey.

Getting the Word Out . . .



Be sure that all people in your organization are aware that a **BMP** survey will be conducted. It is important that everyone have a good understanding of the purpose of the survey and why your organization is hosting it.

Informing the Presenters . . .



Anyone giving presentations during the survey should review the **BMP** literature and view the video explaining the survey process. This will help them in their preparation for the survey and provide them with a good understanding of the **BMP** survey process. *Stress* the fact that this is not an *AUDIT*, but an opportunity for them to explain their best practices and have them evaluated by an independent team of experts.

Hosting the Pre-Survey Visit . . .



Eight weeks prior to the actual survey, a one-day pre-survey visit to your facility should be conducted. The Survey Team Chairman, along with one or two **BMP** representatives, will meet with you to review and discuss your list of proposed presentations. A brief description of the topics on your list should be provided so the Team Chairman can determine the experience requirements and size of the survey teams needed.



Access restrictions, security clearance requirements, and on-site logistical support for the survey team members will also be discussed. Prior to the actual survey, a list of team members and their biographies will be provided so you can determine their experience level and decide if there is a team member on the list that you would prefer not be included.



A facility tour and a brief meeting with the senior managers as well as the people who will be involved in the survey should be conducted, time permitting.

Pre-Survey Visit Agenda . . .



The following is an example of a typical pre-survey visit and meeting agenda:

- **BMP** Personnel Arrive On-Site
- Welcome and Introductions
- **BMP** Survey Process Overview
- Company Overview and Comments
- Facility Tour
- Review Proposed Survey Topics
- Discuss Survey Team Size and Expertise
- Define Access and Security Clearance Requirements
- **BMP** Personnel Depart



Time required for this visit is normally less than one day and is dependent on the number of topics that will be presented during the actual survey.

Scheduling Presentations . . .



A typical survey starts on Monday afternoon with introductions, an overview of your organization, and a facility tour. Presentations are given on Tuesday and Wednesday. The survey draft report is prepared by the **BMP** survey team on Thursday. The survey concludes early Friday morning with the Survey Team Chairman and the team leaders providing an oral report of the survey findings to your organization. The Survey Team Chairman will discuss the schedule for your survey during the pre-survey visit.



As many as six presentations for each team per day can be scheduled concurrently. They should not exceed more than one hour in length including time for questions, answers, and tours. Related topics should be grouped and scheduled for each survey team, such as Management issues, Production activities, or Design considerations. This allows daily concurrent presentations to each team.

Remember, the survey teams will work to your schedules. You decide the times that will cause the least disruption to your operations.

A typical survey schedule for one survey team can be found on the next page.

Typical One Day Schedule For One Team

DATE/TIME	ACTIVITY	PRESENTER	LOCATION
00/00 0745	Meet team coordinator	Name & Phone Number	Building No. Room No.
0800 0840	Presentation Topic		
0840 0920	Presentation Topic		
0920 0930	Break		
0930 1000	Tour		
1000 1040	Presentation Topic		
1040 1120	Presentation Topic		
1120 1150	Tour		
1150 1235	Lunch		
1235 1315	Presentation Topic		
1315 1355	Presentation Topic		
1355 1405	Break		
1405 1435	Tour		
1435 1500	Follow-ups End of Day		

NOTE: This example is for *one* survey team for *one* day. Additional teams schedules should follow this same format to allow for concurrent presentations during the week.

SURVEY

TEAM

REQUIREMENTS



The following requirements are needed by the survey team to ensure a successful survey of your organization.

Information Package . . .

An information package describing your facility, its products and history, along with any other facts or points of interest that would help the survey team get to know your facility a little better, would be helpful but is not mandatory. Also, a list of local restaurants would be appreciated by the survey team.

Security Clearance Information . . .

Provide any restrictions or security clearance requirements to the Survey Team Chairman during the pre-survey visit. A list of the proposed team members and a description of their background and experience will be sent to you prior to the survey for your final approval.

Individual Team Facilitators . . .

Each survey team will require a team guide or facilitator to help keep the presentations on schedule and assist the team in getting to the correct locations on time.

On-Site Facility Requirements . . .

Parking arrangements during the week of the survey should be made for the survey teams. The Survey Team Chairman and technical writer will require office space with access to a laser printer from Tuesday through Thursday so the team write-ups can be printed. Work spaces for the individual survey teams, near the technical writer, will be required on Thursday, as well as reproduction capabilities to develop presentations and reproduce copies of the survey report for distribution at Friday's debrief.

ACTIVITIES DURING THE SURVEY



The following activities will take place during the week of your survey. It is important to remember that the purpose of this survey is to showcase your best practices. The survey team will only document and validate the information that is provided to them during the week.

Typical Survey Agenda . . .



- Monday Afternoon
Introductions
Company Overview
Facility Tour
Survey Agenda Discussion



- Tuesday & Wednesday
Presentations given concurrently to each survey team.



- Thursday
Preparation of the survey draft report by the **BMP** team.



- Friday Morning
An oral report of the survey findings will be presented by the Survey Team Chairman and Team Leaders to your organization's management and other personnel.



- Survey concludes and the **BMP** Survey Team departs.

Presentations During the Survey . . .



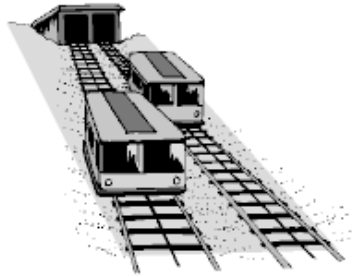
When giving presentations during the survey, try to use a conference room or other quiet area so the team can clearly hear and take notes. Include tours so the practice or process can be validated. These tours can be combined with more than one presentation so they do not continually disrupt your operations.

The following is the preferred presentation format:

- Explain what existed before the current process and what caused the need to change.
- Describe the current method. List any equipment, hardware, software, etc. required.
- Provide graphics, if available, that help explain the process, lessons learned or Metrics of the benefits obtained.
- Tour and demonstration of the process in use for verification.

Note: Presentations should focus on the process and *not* on products or capabilities. A copy of the presentation will be required by each team member to be used for note taking during the presentation.

Staying on Track . . .



Kee in touch with the Survey Team Chairman during the week to ensure that the presentations given are providing the survey teams with the information they need. This will ensure a successful survey.

Adding Additional Presentations . . .



Additional presentations can be added to the schedule during the week of the survey if time permits. The Survey Team Chairman should be advised so that arrangements can be made to adjust the teams, if necessary. This will ensure that the survey report reflects everything you want to present.

Copying the Draft Survey Report . . .



On Thursday, arrangements for the reproduction of the draft survey report should be made so that copies will be available for hand out to all attendees at the Friday morning survey debrief.

Conducting the Survey Debrief . . .



The Friday morning survey debrief should be attended by management as well as all the presenters and other personnel you choose to invite. Draft copies of the survey report, and an oral presentation of the survey findings and how they measure up with the rest of the industry, will be provided. This debrief is also an opportunity for your facility and the survey team to exchange information and suggestions on the survey process. Recommendations for improvements are encouraged.

POST SURVEY ACTIONS



The following actions are essential for a timely and successful publication of your organization's survey report. It is also important that you share the results of your survey with others, and provide **BMP** with feedback information on success stories, contacts, etc. Keeping in touch with **BMP** is a sure way of staying informed of the best practices being applied by others.

Reviewing the Survey Draft Report . . .



In addition to the draft report left with you at the Friday debrief, you will be sent an edited version to review for content and acceptance after the receipt of your initial comments. This review should be completed by your organization as soon as possible so the final report can be developed and published.

Publishing the Survey Report . . .



After your organization's final review and acceptance of the edited survey report, an electronic version will be added to **BMP's** Web Site database. A hard copy version will be published and mailed to you and to other organizations on **BMP's** mailing list. The hard copy version does take longer due to the schedule of the contract printer.

Sharing the Results . . .



You are encouraged to share the results of your survey with others, and inform your **BMP** Satellite Center representative of success stories resulting from your participation in the **BMP** program.

REMEMBER

“Best Practices Are Not Eternal”



Staying in touch with the **Best Manufacturing Practices** program is a sure way to help keep your organization informed of the latest developments taking place throughout the country.

ACKNOWLEDGEMENT

This book would not have been possible without the vision of Willis J. Willoughby, Jr. who created the **BMP** program, and Ernie Renner who has had the courage and energy to keep that vision alive.

Many individuals have contributed their time and expertise over the years to make the **Best Manufacturing Practices** program a success. To them, “well done.”

This book designed and written by
Joaquin (Jack) Tamargo
BMP Satellite Center Manager



**Best Manufacturing Practices
Center of Excellence
4321 Hartwick Road
Suite 400
College Park, Maryland 20740
800-789-4BMP
Fax: (301) 403-8180
www.bmpcoe.org**