8/31/2022

BMS75000:2020 1A
EFQM 2020

1st Impressions

Business Management Standard
Cross Reference with
European Foundation for
Quality Management 2020

We attribute this BMS 75000:2020-1A Standard to ISO/IEC Directives Part 1, Consolidated ISO Supplement, 2015, Annex SL

All ISO standards can be purchased at the American National Standards Institute webstore at http://webstore.ansi.org/.

The BMS 75000:2020-1A Standard for Business Management Quality can be downloaded from the Q-Share International Limited Web Site http://www.q-share.co

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BMQS Standard Appendix A Correlation and Cross Reference with the European Foundation for Quality Management 2020 (EFQM:2020)

Introduction

Following the comparison of the Baldrige Excellence Framework 2021-2022 with the Business Management Standard BMS75000:2020 and the excellent response and appreciation it received from the USA Authorities, I was interested in examining the merits and comparisons of the European Foundation for Quality Management 2020 and if it could likewise be challenged as a competitor or companion to the BMS75000:2020 Business Management Standard.

EFQM (European Foundation for Quality Management 2020)

The EFQM was originally launched in 1992 by the European Foundation for Quality Management (EFQM). Its purpose was to help organizations of any size or sector, to develop and implement strategies for increasing the competitiveness of European organizations.

The EFQM model has been adapted and evolved to respond to changes in the European and global markets. The latest revision was launched in 2020 and this new EFQM Excellence Model has changed fundamentally since its predecessor in 2013.

This latest revision has changed from being an assessment tool to a framework simulating the Baldrige Model and its methodology is directed to assist management changes, transformation, and disruption which we must encounter in the operation of our business activities. The 2020 EFQM Model is based on the Why? How? and What? Questions as follows:

1) (**Direction**) Why does this organization exist?
Why Purpose does it fulfill?
Why is this organization's unique Strategy?

2) (**Execution**) How does the organization intend to deliver on its Purpose?
How does the organization plan to deliver on its Strategy?

3) (**Results**). What are the organization's achievements?
What does it intend to achieve tomorrow?

This proscribes and directs the three key sections of the new framework. Each one of these is supported by two or three Criterion of which there are a total of seven. Each one of which is supported by a series of guiding principles the positioning for each of these seven Criterion is set out below.

1) **Direction:** **Criterion 1:** **Purpose, Vision, and Strategy.**
Criterion 2: **Organisational Culture and Leadership.**

2) **Execution:** **Criterion 3:** **Engaging Stakeholders.**
Criterion 4: **Creating Sustainable Value.**
Criterion 5: **Driving Performance & Transformation.**

3) **Results:** **Criterion 6:** **Stakeholder Perceptions**
Criterion 7: **Strategic & Operational Performance**

There is a surprising similarity between the EFQA 2020 Criterion and the Baldrige Excellence Framework 2021-2022 subjects which is evidenced in the tables contained in this project's reports and the analysis. A summary comparator is explained in the following table:

EFQM 2020 (European Foundation for Quality Management 2020)	BEF 2021-2022 Baldrige Excellence Framework 2021-2022	BMS75000:2020 Business Management Standard
Criterion 1: Purpose, Vision, and Strategy	P1 Organizational Description 2.0 Strategy	4.0 Context of the Business 6.0 Business Planning
Criterion 2: Organisational Culture and Leadership.	P2 Organizational Situation 1.0 Leadership	5.0 Governance and Commitment
Criterion 3: Engaging Stakeholders.	P1b Organizational Relationships 3.0 Customers	4.2 Understanding the needs and expectations of interested parties
Criterion 4: Creating Sustainable Value.	4.0 Measurement, Analysis, and Knowledge improvement	7.0 Support 10.0 Business Improvement
Criterion 5: Driving Performance & Transformation.	5.0 Workforce 6.0 Operations	8.0 Business Operation
Criterion 6: Stakeholder Perceptions	7.0 Results	9.1 Monitoring, Measurement, Analysis, Evaluation
Criterion 7: Strategic & Operational Performance	7.1 Product and Process Results 7.2 Customer Results 7.3 Workforce Results 7.4 Leadership and Governance 7.5 Financial, Market, and Strategy	9.0 Business Performance Evaluation

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EFQM (European Foundation for Quality Management 2020) Continued

There is an EFQM diagnostic tool proposed for use in the evaluation of compliance called "**RADAR**" which comes from the belief that an organization needs to:

a) Determine the objectives and Results it is aiming to achieve as part of its strategy.
b) Have in place several **A**pproaches that must deliver the required results, both now and in the future
c) **D**eploy these approaches appropriately
d) **A**ssess and **R**efine the deployed approaches to learn and improve

When we apply for EFQM recognition they are scored out of 1,000 points, which are divided across the seven Criterion as shown in the following readily recognized image:

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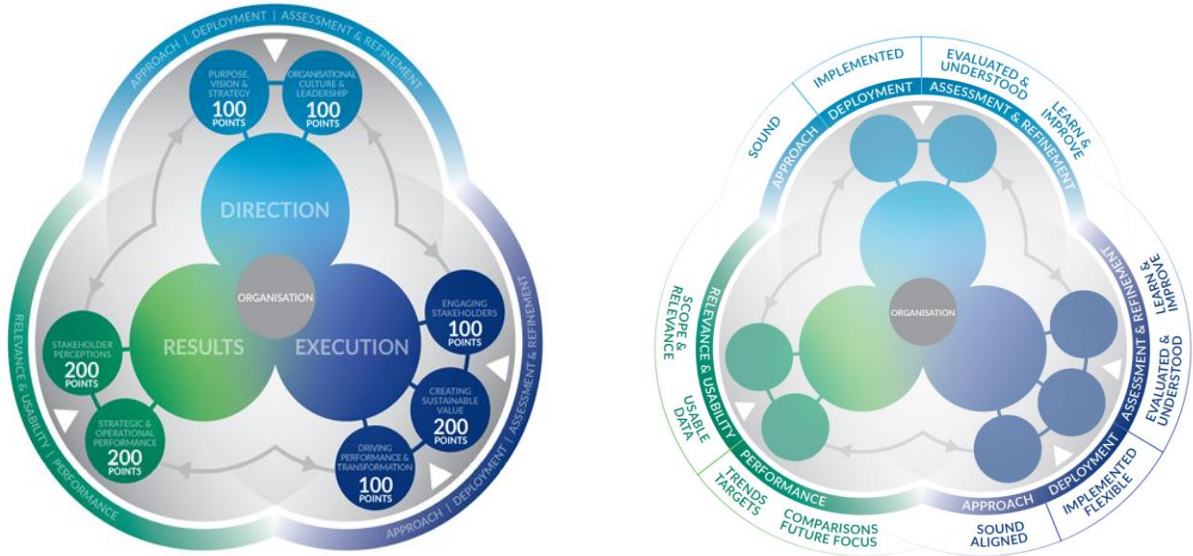
The Malcolm Baldrige National Quality Award (MBNQA) is an award established by the U.S. Congress in 1987 to raise awareness of quality management and recognize U.S. companies that have implemented successful quality management systems. The award is the nation's highest presidential honour for performance excellence. The MBNQA award is named after the late Secretary of Commerce Malcolm Baldrige, a proponent of quality management. The U.S. Commerce Department's National Institute of Standards and Technology manages the award, and ASQ administers it.

Like the Malcomb Baldrige National Awards Scheme, there is an EFQM system of recognition that aims to show how well an organization is performing in its compliance and development against the EFQM Model. Organizations can achieve different levels of recognition:

1. Validated independently by the EFQM
2. Qualified and registered by the EFQM
3. Recognized by EFQM, 3-7 stars
4. EFQM Global Award

The EFQM recognition process is undertaken by independent EFQM Assessors who review performance using a gap analysis against the EFQM Model.

In addition to providing recognition of best practices in quality and improvement at a national level, I can see that the 2020 EFQM Excellence Model has indigenous additional uses for those organizations seeking to improve their business activities in a consistently changing environment.

The EFQM itself recognized its 2013 model was purely an assessment tool and the 2020 revision has made fundamental changes to the model, by adopting a Baldrige Excellence 2021-2022 format. This has developed a framework and methodology to help organizations deal with national or global changes and shifts that impose unknowns on the business world, such as the Covid global pandemic.

Improved business conduct and management are achieved by applying and using the EFQM Excellence Model which is designed to help an organization:

a) Define its context and purpose.
b) Create a culture and consensus.
c) Forge strong leadership practices.
d) Foster agile and responsive practices.
e) Address unique organizational challenges.
f) Forecast events and prepare for the future.

However, the EFQM Excellence Model is not suitable as a quick fix for business improvement.

To support the implementation of the EFQM Excellence Model the Company must need to adapt or develop a Business Management System compliant with BMS75000:2020 that is structured toward Business Improvement.

This requires a culture and techniques for credible business activities and a business program which creates a commitment and appetite for continuous improvement at all levels of the Company.

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BMS75000:2020 Business Management Standard

In comparison to the EFQM Excellence Model, the BMS75000:2020 Business Management Standard directs a Company to improve the decision-making of the organization's executives by ensuring such decisions are always made from an informed and defendable position.

Its prime function is to provide a system for best business practices that can support the executive decision-makers in the Company to make the correct decisions given the occasion and information to hand.
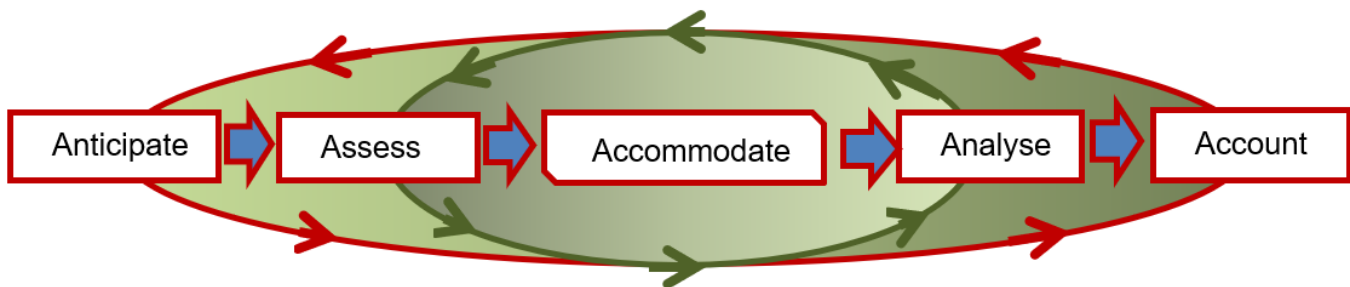
The advantages we have derived from comparing the challenges and inquiries in the Baldrige Excellence Framework 2021-2022 *(BEF)* and the EFQM Excellence Model with the Business Management Standard BMS75000:2020 *(BMS75k)* contents and solutions are significant.

The parity in these initiatives remains a significant validation of the methods by which we approach the subject and integrity of Better Business Management. There is a synergy between the BMS75k standard, EFQM Model, and the BEF framework which compliments each other, despite the approach being from totally different positions. This is because both the EFQM Model and Baldrige Excellence Framework 2021-2022 are inquisitive and non-prescriptive whereas the BMS75000:2020 Business Management Standard is Prescriptive and Instructional.

By compliance with BMS75000:2020 Business Management Standard, we can achieve a good score in the testing of the EFQM Model as we have with the Baldrige Excellence Framework 2021-2022. Likewise, by applying and scoring high in the framework and model we can prove compliance with the BMS75000:2020 Business Management Standard and be worthy of application for the EFQM Global Award.

Both the EFQM and BMS75000:2020 Business Management Standard are directed at improving the decision-making of the Company and its executives by ensuring such decisions are always made from an informed and defendable position.

In this respect and with that objective, the BMS75k Management Standard promotes the convention of the 5As'

Anticipate:	The identification of risks, opportunities, trends, and life cycle stages.
Assess:	The determination of a quantified and measurable aspect or attribute.
Accommodate:	The hosting or processing resources needed to accept
Analyze	The measurement of the product of the Business Activities
Account:	The recording and stewardship of the work done.

Its prime function is to provide a system for best business practices that can support the executive decision-makers in the organization to make informed and correct decisions given the occasion and information to hand.

This can provide a degree of due diligence for executives, whose decisions often favor one stakeholder group to the detriment of another and prescribes a series of actions and requirements that provide for the existence and retrieval of records or details of a defendable position to be available for subsequent and retrospective examination and confirmation by other authorities when required.

Both the EFQM and the BMS75000:2020 Business Management Standard recognize companies are formed to fulfill a specific purpose in society and that purpose drives everything a company does and achieves.

The survival and continuity of a company must depend greatly on its purpose which needs to be accepted by the society in which it operates because business performance is not just assessed against economic performance or profit, but its conduct and contribution to matters of environment and welfare are equally important to its stakeholder.

In such organizations and companies, economics is a restraint on what is done and what its managers can do, it cannot, therefore, be its sole objective.

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BMS75000:2020 Business Management Standard

Organizations and Companies of all types and sizes address matters of quality in the goods and services they provide by reference to standards that permit comparison with that which is specified, and that which is produced. The business itself which facilities the completion and distribution of its goods and services host these activities but has rarely been subjected to specification or verification outside of the scrutiny of its shareholders and financial auditors.

The **BMS75000:2020** Business Management Standard becomes a prescription in which Organizations and Companies can compare their achievements with what is expected of their business management. Unless the quality of the Business Management itself, is suitably measured and continually improved, the process by which goods and services are provided cannot themselves be assured of best practice and stewardship of its stakeholders' interests, cooperation, and investments.

The quality of the management and the management of the business activity which facilitates the completion and distribution of its goods and services is a concern that has not been suitably addressed in the Quality Management Standards ISO9001:2015 or its industrial derivatives and this needs to be addressed. It is for this purpose that this Business Management standard has been prepared and is offered for use in the application, measurement, assessment, verification, and validation of Business Activities and the quality of business management. Compliance by use of the EFQM Model would verify and validate the degree to which its application and adherence have been achieved.

BMS75000:2020 Business Management Standard can be applied at all levels in a Company and throughout the life of a business process including a wide range of business activities.

This includes business operations, markets, processes, functions, projects, goods, services, research, developments, assignments, strategies, selection, and solutions. This standard can be applied to any type of business, whatever its nature or objective, whether being a profit, or non-profit making Company provided it is engaged in legal trading activity.

It is intended that BMS75000:2020 Business Management Standard be utilized to harmonize Business Management processes in existing and future standards.

It provides a common approach in support of standards dealing with different markets, industries, and/or sectors, and does not replace those standards.

It is intended for 3rd party independent assessments and certification as well as stakeholder assessments and verifications of the correctness of our Business Management activities.

As stated previously, there is a surprising similarity between the EFQA 2020 Criterion and the Baldrige Excellence Framework 2021-2022 subjects which is evidenced in the tables contained in this project's reports and the analysis.

A summary comparator is explained in the following table:

BMS75000:2020 Business Management Standard	EFQM 2020 (European Foundation for Quality Management 2020)	BEF 2021-2022 Baldrige Excellence Framework 2021-2022
4.0 Context of the Business 6.0 Business Planning	Criterion 1: Purpose, Vision, and Strategy	P1 Organizational Description 2.0 Strategy
5.0 Governance and Commitment	Criterion 2: Organisational Culture and Leadership.	P2 Organizational Situation 1.0 Leadership
4.2 Understanding the needs and expectations of interested parties	Criterion 3: Engaging Stakeholders.	P1b Organizational Relationships 3.0 Customers
7.0 Support 10.0 Business Improvement	Criterion 4: Creating Sustainable Value.	4.0 Measurement, Analysis, and Knowledge improvement
8.0 Business Operation	Criterion 5: Driving Performance & Transformation.	5.0 Workforce 6.0 Operations
9.1 Monitoring, Measurement, Analysis, Evaluation	Criterion 6: Stakeholder Perceptions	7.0 Results
9.0 Business Performance Evaluation	Criterion 7: Strategic & Operational Performance	7.1 Product and Process Results 7.2 Customer Results 7.3 Workforce Results 7.4 Leadership and Governance 7.5 Financial, Market, and Strategy

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**BMQS Standard Appendix A Correlation and Cross Reference with the
European Foundation for Quality Management 2020 (EFQM:2020)**

Clause Ref	The EFQM Model Revised 2nd Edition	Clause Ref	BMQS75000:2020 Business Management Standard Prime Solutions and Directives
1.0 INTRODUCING THE EFQM MODEL		**0.0-03**	**Introduction**
1.1	Guiding Principles that shaped the EFQM Model	0.4	Commitment and inclusion of other management systems
1.2	Use Cases	1.2	Application
1.2.1	Understanding Organizational Maturity	4.2	Understanding the Company and its Relations
1.2.2	Driving Transformation Programs	6.4	Management of Change
1.2.3	Undergoing External Assessment Achieving Recognition	1.2	Application
1.2.4	Building Organizational Capability for Improvement	10.0	Business Improvement
1.2.5	Building a New Business	1.2	Application
1.2.6	Sensing and Responding to Impact of Market Disruption	6.4.3	Planning and Accommodating Unforeseen Issues
1.2.7	Benchmarking Performance	9.0	Business Performance Evaluation
1.2.8	Managing Corporate Actions	6.1	Actions to address Risks and Opportunities
1.2.9	Managing Risks – Building Resilience	6.1.1	Risk Identification and Management
1.2.10	Qualifying the Capability and "Fit" of your Suppliers	6.1.2	Make or Buy Analysis and Planning
1.3	The EFQM Model: Concept & Structure	1.0	Scope
1.4	Testimonials		
2.0 THE EFQM MODEL		**1.0**	**Scope**
2.1	Direction	6.1.6	Goods and Service Planning Analysis and Reviews
		6.4	Management of Change
		6.4.3	Planning and Accommodating Unforeseen Issues
2.2	Execution	8.0	Business Operation
		8.1	Operational Planning and Control
2.3	Results	9.0	Business Performance Evaluation
		9.1	Monitoring, Measurement, Analysis, and Evaluation
CRITERION 1	**PURPOSE, VISION, AND STRATEGY**	**4.0**	**Context of the Business**
1.1	Define Purpose & Vision	4.1	Understanding the Company and its Relations
		4.2	Understanding the Needs and Expectations of Interested Parties
		4.3	Business Management System Scope
		5.2	Business Management Policy
1.2	Identify & Understand Stakeholders Needs	4.1	Understanding the Company and its Relations
		4.2	Understanding the Needs and Expectations of Interested Parties
1.3	Understand the Ecosystem's own Capabilities Major Challenges	4.2	Understanding the Needs and Expectations of Interested Parties
		4.2.1	General
		4.2.2	Legal and Regulatory Requirements
		4.2.3	Identification of Business Stakeholders
		4.2.4	Customer Responsibility and Focus
		4.3	Business Management System Scope
1.4	Develop Strategy	5.0	Governance and Commitment
		5.1	Commitment
		5.2	Business Management Policy
		6.0	Business Planning
1.5	Design & Implement a Governance & Performance Management System	5.0	Governance and Commitment
		5.1	Commitment
		5.2	Business Management Policy
		5.3	Company Roles, Responsibilities, and Authorities
		5.4	Documented Business Management System
		5.5	Cultural Issues and Conventions
CRITERION 2	**ORGANIZATIONAL CULTURE & LEADERSHIP**	**5.0**	**Governance and Commitment**
2.1	Steer the Organization's Culture & Nurture Values	4.5	External Business Considerations
		5.4.3	Departments and Practices
		5.5	Cultural Issues and Conventions
		6.4	Management of Change
		9.1	Monitoring, Measurement, Analysis, and Evaluation
2.2	Create the Conditions for Realizing Change	6.4	Management of Change
		6.4.1	Indigenous Change Preparation and Management,
		6.4.2	External Change Preparation and Management,
		6.4.3	Planning and Accommodating Unforeseen Issues
2.3	Enable Creativity & Innovation	8.3	Research and Development Business Activities
		8.3.1	Research Business Activities
		8.3.2	Development Business Activities
		8.3.3	Research and Development Planning
		8.3.3.1	Research and Development Authorization
		8.3.3.2	Research and Development Project Plan
		8.3.3.3	Commercialization Strategy
		8.3.4	Research and Development Projects
		8.3.5	Research and Development Inputs
		8.3.6	Research and Development Outputs
		8.3.7	Research and Development Results and Records
		8.3.8	Research and Development Assessment
		8.3.9	Research and Development Accountability

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Clause Ref	The EFQM Model Revised 2nd Edition	Clause Ref	BMQS75000:2020 Business Management Standard Prime Solutions and Directives
Criterion 2	**Organizational Culture & Leadership**	**5.0**	**Governance and Commitment**
		0.4	Commitment and inclusion of other management systems
		4.1	Understanding the Company and its Relations
		4.2	Understanding the Needs and Expectations of Interested Parties
		4.3	Business Management System Scope
2.4	**Unite Behind & Engage in Purpose, Vision & Strategy**	4.4	Business Management System
		4.5	External Business Considerations
		5.1	Commitment
		5.2	Business Management Policy
		5.3	Company Roles, Responsibilities, and Authorities
		5.4	Documented Business Management System
		5.5	Cultural Issues and Conventions
CRITERION 3	**ENGAGING STAKEHOLDERS**	**4.2**	**Understanding the Needs and Expectations of Interested Parties**
		4.2.4	Customer Responsibility and Focus
		4.5	External Business Considerations
		6.1.6	Goods and Service Planning Analysis and Reviews
		8.1.3	Customer Services and Support
		8.2	Customer-Related Business Activities
3.1	**Customers: Build Sustainable Relationships**	8.2.1	Determination of Requirements
		8.2.2	Review of Requirements
		8.2.3	Review of Requirement Applications and Use
		8.2.4	Customer Use Lifecycle Support and Provision
		8.2.5	Customer Communication
		8.6.5	Customer Property
		9.1.4	Customer Satisfaction and Perception Evaluation
		5.1.1	Teamwork and Engagement
		5.1.2	Management Commitment
		5.3	Company Roles, Responsibilities, and Authorities
		5.4.3	Departments and Practices
		6.1.2	Make or Buy Analysis and Planning
3.2	**People: Attract, Engage, Develop & Retain**	6.4.1	Indigenous Change Preparation and Management
		7.1.3	Premises Infrastructure and Working Environment
		7.1.4	Occupational Health and Safety
		7.1.6	Human Resources
		7.4.1	Training and Instruction
		8.8	External Business Operational Influences
		9.1.5	Employee Perception Evaluation
		4.1	Understanding the Company and its Relations
		4.2.3	Identification of Business Stakeholders
3.3	**Business & Governing Stakeholders Secure & Sustain Ongoing Support**	5.0/5.1	Governance and Commitment
		5.1.2	Management Commitment
		5.3	Company Roles, Responsibilities, and Authorities
		0.4	Commitment and inclusion of other management systems
		1.3	Conventions
		4.0	Context of the Business
		4.1	Understanding the Company and its Relations
		4.2	Understanding the Needs and Expectations of Interested Parties
		4.5	External Business Considerations
3.4	**Society: Contribute to Development, Well-Being & Prosperity**	5.0	Governance and Commitment
		5.2	Business Management Policy
		5.3	Company Roles, Responsibilities, and Authorities
		5.5	Cultural Issues and Conventions
		5.5.1	Cultural Issues
		5.5.2	National and International Conventions
		0.4	Commitment and inclusion of other management systems
		1.3	Conventions
		4.0	Context of the Business
		4.1	Understanding the Company and its Relations
		4.2	Understanding the Needs and Expectations of Interested Parties
3.5	**Partners & Suppliers: Build Relationships & Ensure Support for Creating Sustainable Value**	4.5	External Business Considerations
		5.0	Governance and Commitment
		5.2	Business Management Policy
		5.3	Company Roles, Responsibilities, and Authorities
		5.5	Cultural Issues and Conventions
		5.5.1	Cultural Issues
		5.5.2	National and International Conventions

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Clause Ref	The EFQM Model Revised 2nd Edition	Clause Ref	BMQS75000:2020 Business Management Standard Prime Solutions and Directives
CRITERION 4	**CREATING SUSTAINABLE VALUE (SUMMARY)**	**8.0**	**Business Operation**
4.1	**Design the Value & How it is Created**	8.3	Research and Development Business Activities
4.2	**Communicate & Sell the Value**	8.2	Customer-Related Business Activities
		8.4	Design and Selection Business Activities
4.3	**Deliver the Value**	8.1	Operational Planning and Control
		8.6	Business Goods and Service Processes
4.4	**Define & Implement the Overall Experience**	9.0	Business Performance Evaluation
CRITERION 4	**CREATING SUSTAINABLE VALUE (DETAILED)**	**8.1**	**Operational Planning and Control**
4.1	**Design the Value & How it is Created**	8.1	Operational Planning and Control
		8.2	Customer-Related Business Activities
		8.3	Research and Development Business Activities
		8.4	Design and Selection Business Activities
		8.5	Purchasing Business Activities
		8.6	Business Goods and Service Processes
		8.7	Control of Non-conforming Products and Services
		8.8	External Business Operational Influences
		8.8.1	Determining External Business Operational Influences
		8.8.2	Monitoring External Business Operational Influences
4.2	**Communicate & Sell the Value**	4.2	Understanding the Needs and Expectations of Interested Parties
		4.2.4	Customer Responsibility and Focus
		6.2.3	Business Analysis and Planning
		6.2.4	Market Analysis and Planning
		6.2.5	Sales Forecasting and Realisation
		7.6	Resource and Support for External Influences
		8.1.2	Marketing and Public Relations
		8.1.3	Customer Services and Support
		8.1.7	Servicing and After-Sales Administration
		8.2	Customer-Related Business Activities
		8.2.1	Determination of Requirements
		8.2.2	Review of Requirements
		8.2.3	Review of Requirement Applications and Use
		8.2.4	Customer Use, Lifecycle, Support, and Provision
		8.2.5	Customer Communication
		8.4	Design and Selection Business Activities
		8.4.4	Design and Selection Inputs
		8.4.5	Design and Selection Outputs
4.3	**Deliver the Value**	8.1	Operational Planning and Control
		8.1.1	Financial Administration and Accounts
		8.1.2	Marketing and Public Relations
		8.1.3	Customer Services and Support
		8.1.4	Technical Services and Support
		8.1.5	Goods and Service Management and Distribution
		8.1.6	Process Management and Stewardship
		8.1.7	Servicing and After-Sales Administration
		8.1.8	Goods, Service, and Process Configuration Management
		8.2	Customer-Related Business Activities
		8.3	Research and Development Business Activities
		8.4	Design and Selection Business Activities
		8.5	Purchasing Business Activities
		8.6	Business Goods and Service Processes
		8.6.1	Control of goods and service provision
		8.6.1.1	Process Safety and Environmental Impacts
		8.6.1.2	Process Verification
		8.6.1.3	Control of Changes
		8.6.1.4	Control of Process Changes
		8.6.1.5	Control of Equipment, Tools, Software, and Programs
		8.6.1.6	Post-delivery Support
		8.6.2	Validation of Processes and Service Provision
		8.6.3	Identification and Traceability
		8.6.3.1	Identification and Management of Changes
		8.6.3.2	Traceability, Integrity, and Provenance
		8.6.3.3	Obsolescence and Substitution,
		8.6.4	Control of Work Transfer
		8.6.5	Customer Property
		8.6.6	Prevention Against Counterfeit Goods
		8.6.6.1	Responsibility
		8.6.6.2	Control Plan
		8.6.7	Preservation and Release of Goods and Services
		8.7	Control of Non-conforming Products and Services
		8.8	External Business Operational Influences

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Clause Ref	The EFQM Model Revised 2nd Edition	Clause Ref	BMQS75000:2020 Business Management Standard Prime Solutions and Directives
CRITERION 4	**CREATING SUSTAINABLE VALUE**	**6.0**	**Business Planning**
4.4	**Define & Implement the Overall Experience**	**9.0**	**Business Performance Evaluation**
		9.1	**Monitoring, Measurement, Analysis, and Evaluation**
CRITERION 5	**DRIVING PERFORMANCE & TRANSFORMATION**	**6.0**	**Business Planning**
5.1	**Drive Performance & Manage Risk**	**6.1**	**Actions to address Risks and Opportunities**
		6.1.1	**Risk Identification and Management**
		6.1.2	**Make or Buy Analysis and Planning**
		6.1.3	**Project Management Planning**
		6.1.4	**Process Planning, Management, and Control**
		6.1.5	**Outsourcing and Subcontract Planning**
		6.1.6	**Goods and Service Planning Analysis and Reviews**
5.2	**Transform the Organization for the Future**	**6.1.3**	**Project Management Planning**
		6.2	**Business Objectives and Plans**
		6.2.1	**Business Objectives**
		6.2.2	**Business Plans**
		6.2.3	**Business Analysis and Planning**
		6.2.4	**Market Analysis and Planning**
		6.2.5	**Sales Forecasting and Realization**
		6.2.6	**Financial Analysis and Planning**
		6.2.7	**Budget Management and Cost Control**
		6.4	**Management of Change**
		6.4.1	**Indigenous Change Preparation and Management,**
		6.4.2	**External Change Preparation and Management,**
		6.4.3	**Planning and Accommodating Unforeseen Issues,**
5.3	**Drive Innovation & Utilize Technology**	**6.4**	**Management of Change**
		8.3	**Research and Development Business Activities**
		8.3.4	**Research and Development Projects**
		8.3.6	**Research and Development Outputs**
		8.3.7	**Research and Development Results and Records**
5.4	**Leverage Data, Information & Knowledge**	**7.5.3**	**Control of Documented Information**
		7.5.3.1	**Document and Data Control**
		7.5.3.2	**Control of Business Records**
5.5	**Manage Assets & Resources**	**7.1**	**Resources**
		7.1.1	**Resource Requirement Identification**
		7.1.2	**Provision of Resources**
		7.1.3	**Premises Infrastructure and Working Environment**
		7.1.4	**Occupational Health and Safety**
		7.1.5	**Measurement Facilities and Equipment**
		7.1.6	**Human Resources**
		7.3	**Awareness and understanding**
CRITERION 6	**STAKEHOLDER PERCEPTIONS**	**9.0**	**Business Performance Evaluation**
		9.1	**Monitoring, Measurement, Analysis, and Evaluation**
Criterion 6	*Stakeholder Perceptions*	**9.0**	**Business Performance Evaluation**
		9.1	**Monitoring, Measurement, Analysis, and Evaluation**
		9.1.1	**Monitoring and Measurement of Processes**
		9.1.2	**Monitoring and Measurement of Goods and Services**
		9.1.3	**Shareholder Perception Evaluation**
		9.1.4	**Customer Satisfaction and Perception Evaluation**
		9.1.5	**Employee Perception Evaluation**
		9.1.6	**Supplier Perception Evaluation**
		9.1.7	**Stakeholders' Perception, Expectations, and Satisfaction**
(6.1)	*Customer Perception Results*	**9.1.4**	**Customer Satisfaction and Perception Evaluation**
(6.2)	**People Perception Results**	**9.1.5**	**Employee Perception Evaluation**
(6.3)	*Business & Governing Stakeholders' Perception of Results*	**9.1.3**	**Shareholder Perception Evaluation**
(6.4)	*Society Perception Results*	**9.1.7**	**Stakeholders' Perception, Expectations, and Satisfaction**
(6.5)	*Partners & Supplier Perception Results*	**8.5**	**Purchasing Business Activities**
		9.1.3	**Shareholder Perception Evaluation**
		9.1.6	**Supplier Perception Evaluation**
Criterion 6	*Stakeholder Perceptions*	**9.1.7**	**Stakeholders' Perception, Expectations, and Satisfaction**
CRITERION 7	**STRATEGIC & OPERATIONAL PERFORMANCE**	**8.0**	**Business Operation**
(7.0)	*Strategic & Operational Performance*	**8.1**	**Operational Planning and Control**
		8.1.1	**Financial Administration and Accounts**
		8.1.2	**Marketing and Public Relations**
		8.1.3	**Customer Services and Support**
		8.1.4	**Technical Services and Support**
		8.1.5	**Goods and Service Management and Distribution**
		8.1.6	**Process Management and Stewardship**
		8.1.7	**Servicing and After-Sales Administration**
		4.1	**Understanding the Company and its Relations**
		4.2.3	**Identification of Business Stakeholders**
		9.1.7	**Stakeholders' Perception, Expectations, and Satisfaction**

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CRITERION 7	STRATEGIC & OPERATIONAL PERFORMANCE	8.0	Business Operation
(7.1)	Achievements in delivering its Purpose and Creating Sustainable Value	8.1	Operational Planning and Control
		6.1	Actions to address Risks and Opportunities
		6.1.1	Risk Identification and Management
(7.2)	Financial Performance	8.1.1	Financial Administration and Accounts
		9.1.3	Shareholder Perception Evaluation
(7.3)	Fulfillment of Key Stakeholder's Expectations	4.1	Understanding the Company and its Relations
		4.2.3	Identification of Business Stakeholders
		9.1.7	Stakeholders' Perception, Expectations, and Satisfaction
(7.4)	Achievement of Strategic Objectives	6.2	Business Objectives and Plans
		6.2	Business Objectives and Plans
		6.2.1	Business Objectives
		6.2.2	Business Plans
		6.2.3	Business Analysis and Planning
		6.2.4	Market Analysis and Planning
		6.2.5	Sales Forecasting and Realization
		6.2.6	Financial Analysis and Planning
		6.2.7	Budget Management and Cost Control
		6.2.7.1	Budget Management
		6.2.7.2	Cost Control
		6.4	Management of Change
		6.4.1	Indigenous Change Preparation and Management,
		6.4.2	External Change Preparation and Management,
		6.4.3	Planning and Accommodating Unforeseen Issues,
(7.5)	Achievements in Driving Performance	9.0	Business Performance Evaluation
		9.1	Monitoring, Measurement, Analysis, and Evaluation
		9.1.1	Monitoring and Measurement of Processes
		9.1.2	Monitoring and Measurement of Goods and Services
		9.1.3	Shareholder Perception Evaluation
		9.1.4	Customer Satisfaction and Perception Evaluation
		9.1.5	Employee Perception Evaluation
		9.1.6	Supplier Perception Evaluation
		9.1.7	Stakeholders' Perception, Expectations, and Satisfaction
(7.6)	Achievements in Driving Transformation	6.4	Management of Change
		6.4.1	Indigenous Change Preparation and Management,
		6.4.2	External Change Preparation and Management,
		6.4.3	Planning and Accommodating Unforeseen Issues
(7.7)	Predictive Measures for the Future.	4.0	Context of the Business
		4.1	Understanding the Company and its Relations
		4.2	Understanding the Needs and Expectations of Interested Parties
		4.5	External Business Considerations
		5.1.3	Succession Policy and Planning
		5.4	Documented Business Management System
		6.1	Actions to address Risks and Opportunities
		6.1.4	Process Planning Management and Control
		6.2	Business Objectives and Plans
		6.2.3	Business Analysis and Planning
		6.3	Business Continuity
		6.4	Management of Change
		7.2	Competence and Capability
		7.3	Awareness and Understanding
		7.6	Resource and Support for External Influences
		8	Business Operation
		8.1	Operational Planning and Control
		8.2	Customer-Related Business Activities
		8.2.4	Customer Use, Lifecycle, Support, and Provision
		8.3	Research and Development Business Activities
		8.8	External Business Operational Influences
		8.8.1	Determining External Business Operational Influences
		8.8.2	Monitoring External Business Operational Influences
		9.0	Business Performance Evaluation
		9.1	Monitoring, Measurement, Analysis, and Evaluation
		9.1.7	Stakeholders' Perception, Expectations, and Satisfaction
		9.3	Management Review
		9.4	Management of Unforeseeable Events
		10,1	Opportunities for Improvement
		10.2.4	Preventive Measures
		10.3	Continual Improvement.

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3.0	**The EFQM Diagnostic Tool: RADAR**	**9.0**	**Business Performance Evaluation**
3.1	**Introduction**		**Monitoring, Measurement, Analysis, and Evaluation**
		9.1	**Monitoring and Measurement of Processes**
		9.1.1	**Monitoring and Measurement of Goods and Services**
3.2	**Applying RADAR for Direction & Execution**	9.1.2	**Shareholder Perception Evaluation**
		9.1.3	**Customer Satisfaction and Perception Evaluation**
3.3	**Applying RADAR for Results**	9.1.4	**Employee Perception Evaluation**
		9.1.5	**Supplier Perception Evaluation**
3.4	**Scoring using the RADAR Matrix Charts**	9.1.6	**Stakeholder's Perception, Expectations, and Satisfaction**
		9.1.7	**Business Management System Assessment (Gap Analysis)**
		Appx JA	
		Appx JA	**Business Management System Assessment (Gap Analysis)**
		9.0	**Business Performance Evaluation**
		9.1	**Monitoring, Measurement, Analysis, and Evaluation**
		9.1.1	**Monitoring and Measurement of Processes**
4.0	**EFQM SCORING ANALYSIS**	9.1.2	**Monitoring and Measurement of Goods and Services**
		9.1.3	**Shareholder Perception Evaluation**
		9.1.4	**Customer Satisfaction and Perception Evaluation**
		9.1.5	**Employee Perception Evaluation**
		9.1.6	**Supplier Perception Evaluation**
		9.1.7	**Stakeholder's Perception, Expectations, and Satisfaction**
1.0	**Purpose, Vision, and Strategy**	**6.0**	**Business Planning**
	1.1 Define Purpose & Vision	5.2	**Business Management Policy**
	1.2 Identify & Understand Stakeholders Needs	4.2	**Understanding the Needs and Expectations of Interested Parties**
	1.3 Understand the Ecosystem, Own Capabilities & Major Challenges	4.3	**Business Management System Scope**
	1.4 Develop Strategy	6.0	**Business Planning**
	1.5 Design & Implement a Governance & Performance Management System	5.0 / 5.4	**Governance and Commitment** / **Documented Business Management System**
2.0	**Organizational Culture and Leadership.**	**4.0**	**Understanding the Company and its Relations**
	2.1 Steer the Organization's Culture and Nurture Values	5.5	**Cultural Issues and Conventions**
	2.2 Create the Conditions for Realizing Change	6.4	**Management of Change**
	2.3 Enable Creativity & Innovation	8.3	**Research and Development Business Activities**
	2.4 Unite Behind & Engage in Purpose, Vision & Strategy	5.1.1	**Teamwork and Engagement**
3.0	**Engaging Stakeholders**		**Understanding the Needs and Expectations of Interested Parties**
	3.1 Customers: Build Sustainable Relationships	4.2	**Customer Responsibility and Focus**
	3.2 People: Attract, Engage, Develop & Retain	4.2.4	**Resources**
		7.1-7.1.6	**Human Resources**
		4.1	**Understanding the Company and its Relations**
		4.2	**Understanding the Needs and Expectations of Interested Parties**
	3.3 Business & Governing Stakeholders: Secure & Sustain Ongoing Support	4.2.1	**General**
		4.2.3	**Identification of Business Stakeholders**
		5.3	**Company Roles, Responsibilities, and Authorities**
	3.4 Society: Contribute to Development, Well-Being & Prosperity	4.5	**External Business Considerations**
		5.0	**Governance and Commitment**
	3.5 Partners & Suppliers:	4.2	**Understanding the Needs and Expectations of Interested Parties**
	Build Relationships & Ensure Support for Creating Sustainable Value	4.2.3	**Identification of Business Stakeholders**
4.0	**Creating Sustainable Value**	**6.0**	**Business Planning and Review**
	4.1 Design the Value & How it is Created	6.1	**Actions to address Risks and Opportunities**
	4.2 Communicate & Sell the Value	8.0	**Business Operation**
	4.3 Deliver the Value	8.1	**Operational Planning and Control**
	4.4 Define & Implement the Overall Experience	9.0	**Business Performance Evaluation**
5.0	**Driving Performance & Transformation**	**10.0**	**Business Improvement**
	5.1 Driver Performance & Manage Risk	6.1	**Actions to address Risks and Opportunities**
		6.1.1	**Risk Identification and Management**
	5.2 Transform the Organization for the Future	6.1.3	**Project Management Planning**
	5.3 Drive Innovation & utilize Technology	8.3	**Research and Development Business Activities**
	5.4 Leverage Data, Information & Knowledge	7.3	**Awareness and Understanding**
	5.5 Manage Assets & Resources	7.1	**Resources**
		7.1.1	**Resource Requirement Identification**
		7.1.2	**Provision of Resources**
6.0	**Stakeholder Perceptions**	**9.0**	**Business Performance Evaluation**
	6.1 Customer Perception Results	9.1.4	**Customer Satisfaction and Perception Evaluation**
	6.2 People's Perception Results	9.1.5	**Employee Perception Evaluation**
	6.3 Business & Governing Stakeholders' Perception of Results	9.1.3	**Shareholder Perception Evaluation**
	6.4 Society Perception Results	9.1.7	**Stakeholders' Perception, Expectations, and Satisfaction**
	6.5 Partners & Suppliers Perception Results Strategic & Operational Performance	9.1.3 / 9.1.6	**Shareholder Perception Evaluation** / **Supplier Perception Evaluation**
7.0	**Strategic & Operational Performance**	**8.0/6.2**	**Business Operation /6.2Business Objectives and Plans**
(7.1)	Achievements in delivering its Purpose and Creating Sustainable Value	8.1	**Operational Planning and Control**
(7.2)	Financial Performance	8.1.1	**Financial Administration and Accounts**
(7.3)	Fulfillment of Key Stakeholders' Expectations	9.1.3	**Shareholder Perception Evaluation**
(7.4)	Achievement of Strategic Objectives	6.2	**Business Objectives and Plans**
(7.5)	Achievements in Driving Performance	9.1.1/2	**Monitoring and Measurement of Processes, Goods, and Services**
(7.6)	Achievements in Driving Transformation	9.1.2	**Management of Change**
(7.7)	Predictive Measures for the Future.	5.4	**Resource Requirement Identification**

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5.0	**EFQM SENTIMENT ANALYSIS**	**4.1**	**Understanding the Company and its Relations**
	Agile	5.2i)	Responsive to needs and aspirations
	Artificial Intelligence	9.1.2	Monitoring and Measurement of Goods and Services
	Change	6.4	Management of Change
	Circular Economy	8.6.1.6	Post Delivery Support
	Creativity	8.3	Research and Development Business Activities
	Culture	4.5	External Business Considerations
	Diversity	8.6.1.4	Control of Process Changes
	Inclusion	1.0-1.3	Scope, General, Application, and Conventions
	Innovation	8.3	Research and Development Business Activities
	Leadership	5.0-5.1	Governance and Commitment
	Prediction	6.4.2	External Change Preparation and Management
	Purpose	5.2	Business Management Policy
	UN SDG	5.5.2	National and International Conventions
	Stakeholders	4.2	Understanding the Needs and Expectations of Interested Parties
	Strategy	6.0	Business Planning
	Sustainability	6.3	Business Continuity
	Transformation	6.1.2	Make or Buy Analysis and Planning
	Values	4.1	Understanding the Company and its Relations
	Vision	5.4	Documented Business Management System
6.0	**ASSESS-BASE (Continuous Organizational Insight)**	**4.0**	**Context of the Business**
	Direction and understanding:	4.1	Understanding the Company and its Relations
	Clearly Defined Purpose	5.2	Business Management Policy
	Challenges and opportunities (In the environment in which it operates)	6.1	Actions to address Risks and Opportunities
	The needs of its key stakeholders (e.g., customers, shareholders, partners)	4.2	Understanding the Needs and Expectations of Interested Parties
	Clear strategy with priorities and targets	5.2	Business Management Policy
		6.2	Business Objectives and Plans
	System for tracking business performance	9.0	Business Performance Evaluation
		9.1	Monitoring, Measurement, Analysis, and Evaluation
	Defined the culture and values of the organization	5.5	Cultural Issues and Conventions
	Alignment of everyone in the organization with the strategy	5.4	Documented Business Management System
	Embraces and manages change	6.4	Management of Change
	Encourages innovation and creativity	7.2	Competence and Capability
		7.3	Awareness and Understanding
7.0	**KNOWLEDGE-BASE (Setting Best Practice Standards)**		**BMS75000:2020 Business Management Standard**
	Setting Best Practice Standards	1.0-1.3	Scope, General, Applications, and Conventions
	Best Practice	5.3-5.3.2c)	Confirming the identification and promotion of best practices in Business Management throughout the Company.
	Defining and Engraining the Purpose	5.4	Documented Business Management System
		5.4.1	Business Management Manual
		5.4.2	Business Management Practices
		5.4.3	Departments and Practices
	Blended Culture	5.5	Cultural Issues and Conventions
	Project Management for Continuous Growth and Capacity Extension	6.1.3	Project Management Planning
		7.4	Communication
	Life-phase Oriented Personnel Development Concept	7.4.1	Training and Instruction
	Employee Involvement	7.4.2	Advice and Correction
	People's Engagement and Commitment	5.1	Commitment
		5.1.1	Teamwork and Engagement
		5.1.2	Management Commitment
		5.1.3	Succession Policy and Plan
	A Systemic Approach Adapted to an SME	8.5.1-2	Supplier Instructions and Prescription
		8.5.3	Sub-contracting and Supplier Selection Management
	Blueprint for "Positive Leadership	5.0	Governance and Commitment
		5.1.1	Teamwork and Engagement
	Innovation and Future	6.4.3	Planning and Accommodating Unforeseen Issues,
		10.0	Business Improvement
		10.1	Opportunities for Improvement
		10.2.4	Preventive Measures
		10.3	Continual Improvement

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	Foreword	1.0	About EFQM A message from our CEO Introducing the EFQM Model
	Introduction		
0.1	General		
0.2	Business Process Approach		
0.3	Relationship with harmonized standards		
0.4	Commitment and Inclusion of other management systems	1.1	Guiding Principles that shaped the EFQM Model
		2.4	Unite Behind & Engage in Purpose, Vision & Strategy
		3.4	Society: Contribute to Development,
		3.5	Partners & Build Relationships & Ensure Support for
1.0	SCOPE	1.3	The EFQM Model: Concept & Structure
		2.0	The EFQM Model
1.1	General	1.0	Introducing the EFQM Model
1.2	Application	1.2	User Cases
		1.2.3	Undergoing External Assessment Achieving Recognition
		1.2.5	Building a New Business
		1.4	Testimonials
1.3	Conventions	3.4	Well-Being & Prosperity
		3.5	Partners & Build Relationships & Ensure Support
2.0	NORMATIVE REFERENCES	2.0	The EFQM Model
3.0	TERMS AND DEFINITIONS	8.0	Glossary
4.0	CONTEXT OF THE BUSINESS	2.0	Organizational Culture & Leadership
		7.7	Predictive Measures for the Future.
4.1	Understanding the Company and its Relations	1.1	Define Purpose & Vision
		1.2	Identify & Understand Stakeholders Needs
		2.1	Steer the Organization's Culture & Nurture Values
		3.3	Business & Governing Stakeholders: Secure & Sustain Ongoing Support
4.2	Understanding the needs and expectations of interested parties	1.2.1	Understanding Organizational Maturity
		1.3	Understand the Ecosystem's own Capabilities Major Challenges
		CRN3.0	Engaging Stakeholders
4.2.1	General	1.3	Understand the Ecosystem's own Capabilities Major Challenges
		3.5	Partners & Suppliers Build Relationships & Ensure Support for Sustainable Value
4.2.2	Legal and Regulatory Requirements	1.3	Understand the Ecosystem's own Capabilities Major Challenges
4.2.3	Identification of Business Stakeholders	CRN3.0	Engaging Stakeholders
		1.3	Understand the Ecosystem's own Capabilities Major Challenges
		3.3	Business & Governing Stakeholders
		7	Strategic & Operational Performance
		7.3	Fulfillment of Key Stakeholder's Expectations
4.2.4	Customer Responsibility and Focus	1.3	Understand the Ecosystem's own Capabilities Major Challenges
		3.1	Customers: Build Sustainable Relationships
		4.2	Communicate & Sell the Value
4.3	Business Management System Scope	2.0	The EFQM Model
		1.1	Define Purpose & Vision
		1.3	Understand the Ecosystem's own Capabilities Major Challenges
		2.4	Unite Behind & Engage in Purpose, Vision & Strategy
4.4	Business Management System	1.3	Understand Ecosystem Own Capabilities and Major Challenges
		2.4	Unite Behind & Engage in Purpose, Vision & Strategy
4.5	External Business Considerations	3.4	Society: Contribute to Development, Well-Being & Prosperity
		2.1	Steer the Organization's Culture & Nurture Values
		2.4	Unite Behind & Engage in Purpose, Vision & Strategy
		3.1	Customers: Build Sustainable Relationships
		3.4	Society: Contribute to Development, Well-Being & Prosperity
		3.5	Partners & Build Relationships & Ensure Support
5.0	GOVERNANCE AND COMMITMENT	7.7	Predictive Measures for the Future.
		1.4	Develop Strategy
		1.5	Design & Implement a Governance & Performance Management Sys
		CRN 2	Organizational Culture & Leadership
		3.4	Society: Contribute to Development, Well-Being & Prosperity
		3.5	Partners & Build Relationships & Ensure Support
5.1	Commitment	CRM2.0	Organizational Culture & Leadership
		1.4	Develop Strategy
		1.5	Design & Implement a Governance & Performance Management Sys
		2.4	Unite Behind & Engage in Purpose, Vision & Strategy
		3.3	Business & Governing Stakeholders
5.1.1	Teamwork and Engagement	2.4	Unite Behind & Engage in Purpose, Vision & Strategy
		3.2	People: Attract, Engage, Develop & Retain
5.1.2	Management Commitment	3.3	Business & Governing Stakeholders
		3.2	People: Attract, Engage, Develop & Retain
5.1.3	Succession Policy and Plan	7.7	Predictive Measures for the Future.
5.2	Business Management Policy	1.1	Define Purpose & Vision
		1.4	Develop Strategy
		1.5	Design & Implement a Governance & Performance Management Sys
		2.4	Unite Behind & Engage in Purpose, Vision & Strategy
		3.4	Society: Contribute to Development, Well-Being & Prosperity

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5.2	**Business Management Policy**	3.5	Partners & Build Relationships & Ensure Support
5.3	**Company roles, responsibilities, and authorities**	1.5	Design & Implement a Governance & Performance Management Sys
		2.4	Unite Behind & Engage in Purpose, Vision & Strategy
		3.2	People: Attract, Engage, Develop & Retain
		3.3	Business & Governing Stakeholders
		3.4	Society: Contribute to Development, Well-Being & Prosperity
		3.5	Partners & Build Relationships & Ensure Support
5.3.1	**Responsibility and authority**	1.4	Develop Strategy
5.3.2	**Business Management Representative**		
5.4 5.4.1 5.4.2 5.4.3	**Documented Business Management System** **Business Management Manual** **Business Management Practices** **Departments and Practices**	1.1	Define Purpose & Vision
		1.2	Identify & Understand Stakeholders Needs
		1.3	Understand the Ecosystem's Capabilities + Major Challenges
		1.4	Develop Strategy
		1.5	Design & Implement a Governance & Performance Management System
		2.1	Steer the Organization's Culture & Nurture Values
		2.4	Unite Behind & Engage in Purpose, Vision & Strategy
		3.2	People: Attract, Engage, Develop & Retain
		7.7	Unite Behind & Engage in Purpose, Vision & Strategy
5.5	**Cultural Issues and Conventions**	1.5	Design & Implement a Governance & Performance Management System
		2.1	Steer the Organization's Culture & Nurture Values
		2.4	Unite Behind & Engage in Purpose, Vision & Strategy
		3.4	Society: Contribute to Development, Well-Being & Prosperity
		3.5	Partners & Build Relationships & Ensure Support
5.5.1	**Cultural Issues**	3.4	Society: Contribute to Development, Well-Being & Prosperity
		3.5	Partners & Build Relationships & Ensure Support
5.5.2	**National and International Conventions**	2.1	Steer the Organization's Culture & Nurture Values
		3.4	Society: Contribute to Development, Well-Being & Prosperity
		3.5	Partners & Build Relationships & Ensure Support
		5.0	EFQM Sentiment Analysis
6.0	**BUSINESS PLANNING**	1.0	Purpose, Vision, and Strategy
		1.4	Develop Strategy
		4.0	Creating Sustainable Value
		5.0	Driving Performance & Transformation
6.1	**Actions to Address Risks and Opportunities**	1.2.8	Managing Corporate Actions
		4.1	Design the Value & How it is Created
		5.1	Drive Performance & Manage Risk
		7.1	Achievements in delivering its Purpose and Sustainable Value
		7.7	Achievements in delivering its Purpose and Sustainable Value
6.1.1	**Risk Identification and Management**	4.1	Design the Value & How it is Created
		1.2.9	Managing Risks – Building Resilience
		5.1	Drive Performance & Manage Risk
		7.1	Achievements in delivering its Purpose and Sustainable Value
6.1.2	**Make or Buy Analysis and Planning**	1.2.10	Qualifying the Capability and "Fit" of your Suppliers
		3.2	People: Attract, Engage, Develop & Retain
		4.1	Design the Value & How it is Created
		5.1	Drive Performance & Manage Risk
6.1.3	**Project Management Planning**	4.1	Design the Value & How it is Created
		5.1	Drive Performance & Manage Risk
		5.2	Transform the Organization for the Future
6.1.4	**Process Planning, Management, and Control**	4.1	Design the Value & How it is Created
		5.1	Drive Performance & Manage Risk
		7.7	Predictive Measures for the Future.
6.1.5	**Outsourcing and Subcontract Planning**	4.1	Design the Value & How it is Created
		3.5	Partners & Suppliers
6.1.6	**Goods and Service Planning Analysis and Reviews**	3.5	Build Relationships & Ensure Support for Creating Sustainable Value
		2.1	Direction
6.2	**Business Objectives and Plans**	5.2	Transform the Organization for the Future
		7.4	Achievement of Strategic Objectives
		7.7	Predictive Measures for the Future.
6.2.1	**Business Objectives**	5.2	Transform the Organization for the Future
		7.4	Achievement of Strategic Objectives
6.2.2	**Business Plans**	5.2	Transform the Organization for the Future
		7.4	Achievement of Strategic Objectives
6.2.3	**Business Analysis and Planning**	4.2	Communicate & Sell the Value
		5.2	Transform the Organization for the Future
		7.4	Achievement of Strategic Objectives
		7.7	Predictive Measures for the Future.
6.2.4	**Market Analysis and Planning**	4.2	Communicate & Sell the Value
		5.2	Transform the Organization for the Future
		7.4	Achievement of Strategic Objectives
6.2.5	**Sales Forecasting and Realization**	4.2	Communicate & Sell the Value
		5.2	Transform the Organization for the Future
		7.4	Achievement of Strategic Objectives
6.2.6	**Financial Analysis and Planning**	5.2	Transform the Organization for the Future
		7.4	Achievement of Strategic Objectives
6.2.7	**Budget Management and Cost Control**	5.2	Transform the Organization for the Future
		7.4	Achievement of Strategic Objectives
6.2.7.1	**Budget Management**	7.4	Achievement of Strategic Objectives
6.2.7.2	**Cost Control**	7.4	Achievement of Strategic Objectives

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**BMQS Standard Appendix A Correlation and Cross Reference with the
European Foundation for Quality Management 2020 (EFQM:2020)**

Clause Ref	BMQS75000:2020 Business Management Standard Solutions and Directives	Clause Ref	The EFQM Model Revised 2nd Edition EFQM (European Foundation for Quality Management 2020)
6.3	Business Continuity	5.2	Transform the Organization for the Future
		7.7	Predictive Measures for the Future.
6.4	Management of Change	1.2.2	Driving Transformation Programs
		1.2.6	Sensing and Responding to the Impact of Market Disruption
		1.2.9	Managing Risks – Building Resilience
		2.1	Steer the Organization's Culture & Nurture Values
		2.2	Create the Conditions for Realizing Change
		5.2	Transform the Organization for the Future
		5.3	Drive Innovation & Utilize Technology
		7.4	Achievement of Strategic Objectives
		7.6	Achievements in Driving Transformation
		7.7	Predictive Measures for the Future.
6.4.1	Indigenous Change Preparation and Management,	2.2	Create the Conditions for Realizing Change
		3.2	People: Attract, Engage, Develop & Retain
		5.2	Transform the Organization for the Future
		7.4	Achievement of Strategic Objectives
		7.6	Achievements in Driving Transformation
6.4.2	External Change Preparation and Management,	2.2	Create the Conditions for Realizing Change
		5.2	Transform the Organization for the Future
		7.4	Achievement of Strategic Objectives
		7.6	Achievements in Driving Transformation
6.4.3	Planning and Accommodating Unforeseen Issues	1.2.6	Sensing and Responding to the Impact of Market Disruption
		1.2.6	Sensing and Responding to the Impact of Market Disruption
		2.2	Create the Conditions for Realizing Change
		5.2	Transform the Organization for the Future
		7.4	Achievement of Strategic Objectives
		7.6	Achievements in Driving Transformation
7.0	Support and Resources	5.5	Manage Assets & Resources
7.1	Resources	5.5	Manage Assets & Resources
7.1.1	Resource Requirement Identification	5.5	Manage Assets & Resources
7.1.2	Provision of Resources	5.5	Manage Assets & Resources
7.1.3	Premises Infrastructure and Working Environment	3.2	People: Attract, Engage, Develop & Retain
		5.5	Manage Assets & Resources
7.1.4	Occupational Health and Safety	3.2	People: Attract, Engage, Develop & Retain
		5.5	Manage Assets & Resources
7.1.5	Measurement Facilities and Equipment	5.5	Manage Assets & Resources
7.1.6	Human Resources	3.2	People: Attract, Engage, Develop & Retain
		5.5	Manage Assets & Resources
7.2	Competence and Capability	7.7	Predictive Measures for the Future.
7.3	Awareness and understanding	5.5	Manage Assets & Resources
		7.7	Predictive Measures for the Future.
7.4	Communications	4.2	Communicate & Sell the Value
7.4.1	Training and Instruction	3.2	People: Attract, Engage, Develop & Retain
7.4.2	Advice and Correction	3.2	People: Attract, Engage, Develop & Retain
7.5 7.5.1 7.5.2 7.5.3	Documented Information General Creating and updating Control of Documented Information	5.4	Leverage Data, Information & Knowledge
7.5.3.1	Document and Data Control	5.4	Leverage Data, Information & Knowledge
7.5.3.2	Control of Business Records	5.4	Leverage Data, Information & Knowledge
7.6	Resource and Support for External Influences	1.2.9	Managing Risks – Building Resilience
		4.2	Communicate & Sell the Value
		7.7	Predictive Measures for the Future.
8.0	Business Operation	4.0	Creating Sustainable Value (Summary)
		7.0	Strategic & Operational Performance
8.1	Operational Planning and Control	4.0	Creating Sustainable Value
		7.1	Achievements in delivering its Purpose and Creating Sustainable Value
		2.2	Execution
		4.3	Deliver the Value
		4.1	Design the Value & How it is Created
		4.3	Deliver the Value
		7	Strategic & Operational Performance
		7.1	Achievements in delivering its Purpose and Sustainable Value
		7.7	Predictive Measures for the Future.
8.1.1	Financial Administration and Accounts	7.2	Financial Performance
		4.3	Deliver the Value
		7	Strategic & Operational Performance
		7.2	Financial Performance
8.1.2	Marketing and Public Relations	4.2	Communicate & Sell the Value
		4.3	Deliver the Value
		7	Strategic & Operational Performance
8.1.3	Customer Services and Support	4.2	Communicate & Sell the Value
		3.1	Customers: Build Sustainable Relationships
		4.2	Communicate & Sell the Value
		4.3	Deliver the Value
8.1.4	Technical Services and Support	4.2	Communicate & Sell the Value
		4.3	Deliver the Value

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BMQS Standard Appendix A Correlation and Cross Reference with the
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Clause Ref	BMQS75000:2020 Business Management Standard Solutions and Directives	Clause Ref	The EFQM Model Revised 2nd Edition EFQM (European Foundation for Quality Management 2020)
8.1.5	**Goods and Service Management and Distribution**	4.2	Communicate & Sell the Value
		4.3	Deliver the Value
		7	Strategic & Operational Performance
8.1.6	**Process Management and Stewardship**	4.2	Communicate & Sell the Value
		4.3	Deliver the Value
		7	Strategic & Operational Performance
8.1.7	**Servicing and After-Sales Administration**	4.2	Communicate & Sell the Value
		4.3	Deliver the Value
		7	Strategic & Operational Performance
8.1.8	**Goods, Service, and Process Configuration Management**	4.2	Communicate & Sell the Value
		4.3	Deliver the Value
8.2	**Customer-Related Business Activities**	3.1	Customers: Build Sustainable Relationships
		4.2	Communicate & Sell the Value
		4.1	Design the Value & How it is Created
		4.2	Communicate & Sell the Value
		4.3	Deliver the Value
		4.4	Define & Implement the Overall Experience
		7.7	Predictive Measures for the Future.
8.2.1	**Determination of Requirements**	3.1	Customers: Build Sustainable Relationships
		4.2	Communicate & Sell the Value
8.2.2	**Review of Requirements**	3.1	Customers: Build Sustainable Relationships
		4.2	Communicate & Sell the Value
8.2.3	**Review of Requirement Applications and Use**	3.1	Customers: Build Sustainable Relationships
		4.2	Communicate & Sell the Value
8.2.4	**Customer Use Lifecycle Support and Provision**	3.1	Customers: Build Sustainable Relationships
		4.2	Communicate & Sell the Value
		7.7	Predictive Measures for the Future.
8.2.5	**Customer Communication**	3.1	Customers: Build Sustainable Relationships
		4.2	Communicate & Sell the Value
8.3	**Research and Development Business Activities**	2.3	Enable Creativity & Innovation
		4.1	Design the Value & How it is Created
		4.3	Deliver the Value
		5.1	Drive Performance & Manage Risk
		5.2	Transform the Organization for the Future
		5.3	Drive Innovation & Utilize Technology
		5.4	Leverage Data, Information & Knowledge
		5.5	Manage Assets & Resources
		7.7	Predictive Measures for the Future.
8.3.1	**Research Business Activities**	2.3	Enable Creativity & Innovation
8.3.2	**Development Business Activities**	2.3	Enable Creativity & Innovation
8.3.3	**Research and Development Planning**	2.3	Enable Creativity & Innovation
8.3.3.1	**Research and Development Authorization**	2.3	Enable Creativity & Innovation
8.3.3.2	**Research and Development Project Plan**	2.3	Enable Creativity & Innovation
8.3.3.3	**Commercialization Strategy**	2.3	Enable Creativity & Innovation
8.3.4	**Research and Development Projects**	2.3	Enable Creativity & Innovation
		5.3	Drive Innovation & Utilize Technology
8.3.5	**Research and Development Inputs**	2.3	Enable Creativity & Innovation
8.3.6	**Research and Development Outputs**	2.3	Enable Creativity & Innovation
		5.3	Drive Innovation & Utilize Technology
8.3.7	**Research and Development Results and Records**	2.3	Enable Creativity & Innovation
		5.3	Drive Innovation & Utilize Technology
8.3.8	**Research and Development Assessment**	2.3	Enable Creativity & Innovation
8.3.9	**Research and Development Accountability**	2.3	Enable Creativity & Innovation
8.4	**Design and Selection Business Activities**		
8.4.1	**Design Business Activities**		
8.4.2	**Selection Business Activities**		
8.4.3	**Design and Selection Planning**		
8.4.4	**Design and Selection Inputs**		
8.4.4.1	**Design Information Input**		
8.4.4.2	**Selection Information Input**		
8.4.5	**Design and Selection Outputs**		
8.4.5.1	**Output and Product of Design Business Activities**	4.1	Design the Value & How it is Created
8.4.5.2	**Output and Subject of Selection Business Activities**	4.2	Communicate & Sell the Value
8.4.6	**Design and Selection Results, Records, and Changes**	4.3	Deliver the Value
8.4.6.1	**Design and Selection Business Activity Verification**	4.4	Define & Implement the Overall Experience
8.4.6.2	**Design and Selection Business Activity Validation**		
8.4.6.3	**Design and Selection Verification and Validation Testing**		
8.4.6.4	**Design and Development Verification Validation Documentation**		
8.4.6.5	**Control of Design and Selection Changes**		
8.4.6.6	**Sub-tier Design Management and Configuration**		
8.4.6.7	**Design and Selection Subcontractor Management Configuration**		
8.4.7	**Design and Selection Assessment**		
8.4.8	**Design and Selection Accountability**		

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Clause Ref	BMQS75000:2020 Business Management Standard Solutions and Directives	Clause Ref	The EFQM Model Revised 2nd Edition EFQM (European Foundation for Quality Management 2020)
8.5	Purchasing Business Activities	1.3	Understand the Ecosystem's Capabilities + Major Challenges
		4.1	Design the Value & How it is Created
		4.3	Deliver the Value
		6.5	Partners & Supplier Perception Results
8.5.1	Purchasing Process	1.3	Understand the Ecosystem's Capabilities + Major Challenges
		6.5	Partners & Supplier Perception Results
8.5.2	Supplier Instructions and Prescription	1.3	Understand the Ecosystem's Capabilities + Major Challenges
8.5.3	Sub-contracting and Supplier Selection Management		
8.5.4	Sub-tier Processes Integrity and Change Control,	6.5	Partners & Supplier Perception Results
8.5.5	Verification of Purchased Goods		
8.6	Business Goods and Service Processes	3.1	Customers: Build Sustainable Relationships
		4.1	Design the Value & How it is Created
		4.3	Deliver the Value
8.6.1	Control of goods and service provision	4.3	Deliver the Value
8.6.1.1	Process Safety and Environmental Impacts	1.3	Understand the Ecosystem's Capabilities + Major Challenges
8.6.1.2	Process Verification	4.1	Design the Value & How it is Created
8.6.1.3 8.6.1.4	Control of Changes Control of Process Changes	2.2	Create the Conditions for Realizing Change
8.6.1.5	Control of Equipment, Tools, Software, and Programs	4.1	Design the Value & How it is Created
8.6.1.6	Post-delivery Support	4.3	Deliver the Value
8.6.2	Validation of Processes and Service Provision	4.3	Deliver the Value
8.6.3 8.6.3.1 8.6.3.2 8.6.3.3	Identification and Traceability Identification and Management of Changes Traceability, Integrity, and Provenance Obsolescence and Substitution,	4.3 4.4	Deliver the Value Define & Implement the Overall Experience
8.6.4	Control of Work Transfer	5.5	Manage Assets & Resources
8.6.4	Control of Work Transfer	6.5	Partners & Supplier Perception Results
8.6.5	Customer Property	6.5	Partners & Supplier Perception Results
8.6.6 8.6.6.1 8.6.6.2	Prevention Against Counterfeit Goods Responsibility Control Plan	5.1	Drive Performance & Manage Risk
8.6.7	Preservation and Release of Goods and Services	5.3	Drive Innovation & Utilize Technology
8.7	Control of Non-conforming Products and Services	4.0	Creating Sustainable Value.
		4.1	Design the Value & How it is Created
		4.3	Deliver the Value
8.8	External Business Operational Influences	3.2	People: Attract, Engage, Develop & Retain
		4.1	Design the Value & How it is Created
		4.3	Deliver the Value
		7.7	Predictive Measures for the Future.
8.8.1	Determining External Business Operational Influences	3.1	Customers: Build Sustainable Relationships
		4.1	Design the Value & How it is Created
		7.7	Predictive Measures for the Future.
8.8.2	Monitoring External Business Operational Influences	3.1	Customers: Build Sustainable Relationships
		4.1	Design the Value & How it is Created
		7.7	Predictive Measures for the Future.
9.0	Business Performance Evaluation	6.0	Stakeholder Perceptions
		1.2.7	Benchmarking Performance
		2.3	Results
		4.4	Define & Implement the Overall Experience
		4.4	Define & Implement the Overall Experience
		6	Stakeholder Perceptions
		6	Stakeholder Perceptions
		7.5	Achievements in Driving Performance
		7.7	Predictive Measures for the Future.
9.1	Monitoring, Measurement, Analysis, and Evaluation	2.3	Results
		2.1	Steer the Organization's Culture & Nurture Values
		4.4	Define & Implement the Overall Experience
		6	Stakeholder Perceptions
		6	Stakeholder Perceptions
		7.5	Achievements in Driving Performance
		7.7	Predictive Measures for the Future.
9.1.1	Monitoring and Measurement of Processes	6	Stakeholder Perceptions
		7.5	Achievements in Driving Performance
9.1.2	Monitoring and Measurement of Goods and Services	6	Stakeholder Perceptions
		7.5	Achievements in Driving Performance

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Clause Ref	BMQS75000:2020 Business Management Standard Solutions and Directives	Clause Ref	The EFQM Model Revised 2nd Edition EFQM (European Foundation for Quality Management 2020)
9.1.3	Shareholder Perception Evaluation	6	Stakeholder Perceptions
		6.3	Business & Governing Stakeholders' Perception of Results
		6.5	Partners & Supplier Perception Results
		7.2	Financial Performance
		7.5	Achievements in Driving Performance
9.1.4	Customer Satisfaction and Perception Evaluation	3.1	Customers: Build Sustainable Relationships
		6	Stakeholder Perceptions
		6.1	Customer Perception Results
		7.5	Achievements in Driving Performance
9.1.5	Employee Perception Evaluation	3.2	People: Attract, Engage, Develop & Retain
		6	Stakeholder Perceptions
		6.2	People Perception Results
		7.5	Achievements in Driving Performance
9.1.6	Supplier Perception Evaluation	6	Stakeholder Perceptions
		6.5	Partners & Supplier Perception Results
		7.5	Achievements in Driving Performance
9.1.7	Stakeholders' Perception, Expectations, and Satisfaction	6	Stakeholder Perceptions
		6.4	Society Perception Results
		7	Strategic & Operational Performance
		7.3	Fulfillment of Key Stakeholder's Expectations
		7.5	Achievements in Driving Performance
		7.7	Predictive Measures for the Future.
9.2 9.2.1 9.2.2 9.2.3	Internal Audit Internal Audit Planning (Frequency and Scope) Audit Selection Registering Audit Results and Products	4.4 5.0 2.1 2.3	Define & Implement the Overall Experience Driving Performance & Transformation Steer the Organization's Culture & Nurture Values Results
9.3	Management review	2.0-2.3	Direction, Execution, Results
		7.7	Predictive Measures for the Future.
9.4	Management of Unforeseeable Event	2.2	Create the Conditions for Realizing Change
		7.7	Predictive Measures for the Future.
10.0	Business Improvement	1.2.4	Building Organizational Capability for Improvement
		5.0	Driving Performance and Transformation.
10.1	Opportunities for Improvement	7.1	Achievements in delivering Purpose and Creating Sustainable Value
		5.0	Driving Performance and Transformation.
10.2	Nonconformity and Corrective Action	5.5	Manage Assets & Resources
		2.3	Enable Creativity & Innovation
10.2.1	Non-conformance Identification and Containment	5.5	Manage Assets & Resources
		2.3	Enable Creativity & Innovation
10.2.2	Root Cause Analysis	5.4	Leverage Data, Information & Knowledge
		2.3	Enable Creativity & Innovation
10.2.3	Corrective Action	7.7	Predictive Measures for the Future.
		2.3	Enable Creativity & Innovation
10.2.4	Preventive Measures	7.7	Predictive Measures for the Future.
		2.3	Enable Creativity & Innovation
10.3	Continual Improvement.	7.7	Predictive Measures for the Future.

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**BMQS Standard Appendix A Correlation and Cross Reference with the
European Foundation for Quality Management 2020 (EFQM:2020)**

CONFORMANCE TO BMS75000:2020 BUSINESS MANAGEMENT SYSTEM STANDARD
The management of any organization's potential for improvement is greatly assisted by using the European Foundation for Quality Management 2020 (EFQM:2020) because the framework presents a series of questions and lists to which the BMS75000:2020 provides solutions.

It does however require a broad and often imaginative interpretation of the European Foundation for Quality Management 2020 (EFQM:2020) directives for both specifications to apply due to the structure and terminology used in each of the management disciplines and the extensive and comprehensive scope of the standard.

By considering the main heading in BMS75000:2020 we can approach the task in a disciplined fashion:

European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition	BMS75000:2020 Business Management Standard
	Preface to Issue 1 Revision A 4th Impression of the Business Management Standard
	0.0 Introduction
About EFQM	**0.1** General **0.2** Business Process Approach,
A message from our CEO	**0.3** Relationship with harmonized standards
1.0 Introducing the EFQM Model	**0.0** Introduction
1.1 Guiding Principles that shaped the EFQM Model	**0.4** Commitment and Inclusion of other management systems
1.2 Use Cases	**1.0** Scope, **1.1** General, **1.2** Application
1.3 The EFQM Model: Concept & Structure	**1.3** Conventions
1.4 Testimonials	
2 The EFQM Model Direction	**1.0** Scope
Criterion 1: Purpose, Vision & Strategy **(C1)**	**4.1** Understanding the Company and its Relations
Criterion 2: Organizational Culture & Leadership Execution **(C2)**	**5.0** Governance and Commitment
Criterion 3: Engaging Stakeholders **(C3)**	**4.2** Understanding the Needs and Expectations of Interested Parties
Criterion 4: Creating Sustainable Value **(C4)**	**8.0** Business Operation
Criterion 5: Driving Performance & Transformation Results **(C5)**	**9.0** Business Performance Evaluation
Criterion 6: Stakeholder Perceptions **(C6)**	**9.1** Monitoring, Measurement, Analysis, and Evaluation
Criterion 7: Strategic & Operational Performance **(C7)**	**6.0** Business Planning
3 The EFQM Diagnostic Tool: RADAR	**Appendix JA Gap Analysis Assessment Tool**
3.1 Introduction	**Appx JA** **1.0** Purpose and OBJECTIVE
3.2 Applying RADAR for Direction & Execution	**Appx JA** **1.1** Scope
3.3 Applying RADAR for Results	**Appx JA** **1.2** Application
3.4 Scoring using the RADAR Matrix Charts	**Appx JA** **3.0** Assessment and Scoring
4 **EFQM Scoring Analysis**	**9.1** Monitoring, Measurement, Analysis, and Evaluation
5 **EFQM Sentiment Analysis**	**9.1** Monitoring, Measurement, Analysis, and Evaluation
6 **Assess-Base.**	**9.1** Monitoring, Measurement, Analysis, and Evaluation
7 **Knowledgebase.**	**7.5** Documented Information
8 **Glossary.**	**3.0** Terms and definitions
9 **Acknowledgements.**	**0.0** Introduction
10 **Further Help.**	**Forward.**

The structure and clause referencing used by the European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition does not easily lend itself to the application of a comparison with the BMS75000:2020 Business Management Standard as the criterions 1 to 7 have their clause reference duplicates in the introduction, direction diagnostics, scoring and sentimental analysis. Although the subject titles must clarify which details are being referred to we have used the convention of using a prefix to denote the reference to a subclause of a Criterion.

1.0   Introducing the EFQM Model
The introduction and preamble of the European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition and the BMS75000:2020 Business Management Standard both cover similar ground however clause 1.2 covering user cases must be commended for its scope and comprehensive nature. This has comparators in the BMS75k Standard and its Appendix JA.

European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition		BMS75000:2020 Business Management Standard	
1.2.1	**Understanding Organizational Maturity**	**4.2**	**Understanding the Company and its Relations**
1.2.2	**Driving Transformation Programs**	**6.4**	**Management of Change**
1.2.3	**Undergoing External Assessment Achieving Recognition**	**1.2**	**Application**
1.2.4	**Building Organizational Capability for Improvement**	**10.0**	**Business Improvement**
1.2.5	**Building a New Business**	**1.2**	**Application**
1.2.6	**Sensing and Responding to the Impact of Market Disruption**	**6.4.3**	**Planning and Accommodating Unforeseen Issues**
1.2.7	**Benchmarking Performance**	**9.0**	**Business Performance Evaluation**
1.2.8	**Managing Corporate Actions**	**6.1**	**Actions to address Risks and Opportunities**
1.2.9	**Managing Risks – Building Resilience**	**6.1.1**	**Risk Identification and Management**
1.2.10	**Qualifying the Capability and "Fit" of your Suppliers**	**6.1.2**	**Make or Buy Analysis and Planning**

2.0   The EFQM Model Direction and Execution
The European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition addresses the subject of direction and execution under clause 2. This in turn is divided into 7 Criterions which are:

Criterion 1:	Purpose, Vision, and Strategy
Criterion 2:	Organisational Culture and Leadership.
Criterion 3:	Engaging Stakeholders.
Criterion 4:	Creating Sustainable Value.
Criterion 5:	Driving Performance & Transformation**.**
Criterion 6:	Stakeholder Perceptions
Criterion 7:	Strategic & Operational Performance

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2.0   The EFQM Model Direction and Execution Continued

Criterion 1:   Purpose, Vision, and Strategy

This criterion lays down the requirement to define the organization's purpose with the additional requirement that such a definition must contain a vision that is inspirational, aspirational, and has a strategy that delivers.

Organizations Purpose.
We need to explain why our Company's work is important and provide for the creation of a sustained value to deliver to the stakeholders. This in turn must provide a framework and responsibility for the ecosystem contribution.

Organizations Vision:
We need to describe what the organization or Company seeks to do and what its achievements are going to be, specify a clear guide for current and future decisions as to the courses of action, and provide, a basis for setting the Business Strategy.

Organizations Strategy
The strategy is a high-level plan the Company intends to fulfill and justify its purpose by setting strategic priorities and ultimately fulfilling its Vision. These are summarized in 5 listed matters for consideration:

- **1.1   Define Purpose & Vision.**
- **1.2   Identify & Understand Stakeholders Needs.**
- **1.3   Understand the Ecosystem, its Capabilities & Major Challenges.**
- **1.4   Develop Strategy.**
- **1.5   Design & Implement a Governance & Performance Management System.**

Criterion 1 (1.1 Define Purpose & Vision).
The solution to this requirement is suitably covered in the BMS75000:2020 Business Management Standard under Clause **4.3** which requires the Company to consider the Business Management System limitations and extent of its applications to determine its scope. This must include National and International boundaries imposed by external authorities and stakeholders when setting and managing the scope of the Business Management System. The Business Management System scope must be recorded, documented, and published so it is available to all stakeholders and all other known interested parties in a legible and accessible fashion. Consideration must also be given to the matters referred to in **Clauses 4.1**, **4.2, and 5.2.**

Criterion 1 (1.2 Identify & Understand Stakeholders Needs).
BMS75k Clause 4.1 referred to under clause 4.3 discusses the requirement for us to identify and register external and internal authorities and matters that relate to its activities or influence our ability to achieve the planned objectives of its Business Management System.

Under **Clause 4.2** of the BMS75k Standard, we are directed to understand the needs and expectations of interested parties, and requires us to determine:

a)   Parties considered having interests in the Business Management System,
b)   Relevance and extent of the interest these parties are credited with,
c)   Ability, competence, and capacity available and required to achieve the requirements of identified parties.

A Business Management Representative is required to register the known interest of the identified parties and retain the records produced as a controlled business record. The appointment of a Business Management Representative is the subject of clause 5.3.2 and is normally a role given over to a Non-Executive Director.

Stakeholders are recognized by the European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition as those who have an interest in the Company ecosystem. It requires a Company to balance these interests and evaluate the performance of the most important stakeholders, its "Key Stakeholders".

Identifying Key Stakeholders is only one aspect of what the BMS75k Standard requires which goes much further and Clause 4.2b specifies not only the identification of the stakeholders but also their relevance and extent of the interest these parties are credited with. Without such information, addressing the needs and expectations of stakeholders in the decision-making activity would not be adequately informed.

Criterion 1 (1.3 Understand the Ecosystem, own Capabilities & Major Challenges). (BMS75k 4.2, 4.2.1, 4.2.2, 4.2.3, 4.2.4)
European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition refers to the ecosystem by which it acknowledges and advocates that any organization or Company using the EFQM Model:

- Recognizes that a Company resides in a community and does not operate in isolation or a vacuum.
- Accepts the opportunity for a Company to act as a Leader in its technology and sphere of influence.
- Understand that it must face ever-increasing frequency, speeds, and volumes of change.

The Ecosystem is accepted by both the EFQM and BMS75k standards as a consequence of an event that happens in business that may affect other parts within the system, and this must include the influence of external factors. Such matters include government policy, economic cycles, technology, and social influences as well as local and national issues of the day. BMS75k recognizes the need to consider religious and cultural conventions, sustainability, and available financing.

The solution to these requirements resides mainly in **Clause 4.2** of the BMS75k Standard which covers the requirements for an Understanding of the Needs and Expectations of Interested Parties and consists of:

- **4.2.1**   General Needs and Expectations of Interested Parties.
- **4.2.2**   Legal and Regulatory Requirements.
- **4.2.3**   Identification of Business Stakeholders.
- **4.2.4**   Customer Responsibility and Focus.

Additional solutions can also be found from consideration of **Clause 4.1** which covers **"Understanding the Company and its Relations".**

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BMQS Standard Appendix A Correlation and Cross Reference with the
European Foundation for Quality Management 2020 (EFQM:2020)

2.0   The EFQM Model Direction Continued

1.3   Understanding the Ecosystem, Own Capabilities & Major Challenges Continued. (BMS75k 4.2, 4.2.1, 4.2.2, 4.2.3, 4.2.4)
BMS75k Standard recognizes and maintains that a Company must be formed for a purpose, and continues in Business for the specific purpose of producing:

a) The Right Quantity of Products and Services
b) Of the Right Quality,
c) At the Required Time
d) At a competitive and acceptable price
e) Which gives a reasonable return (Profit or Surplus) for the investments made.

This purpose drives everything we do as a Company, however, for us to survive in the long term, our purpose needs to be outwardly looking towards all stakeholders, who have infinitely varied and often opposing and conflicting interests in the Company and its business operations and activities.

Clause 4.2.1 of BMS75k introduces the constraints on the Company's business activities which we address by insisting on clear and accommodating boundaries within which the business activities can be conducted in an informed and acceptable fashion. This must be based initially on the principal stakeholders' requirements and expectations which must be reviewed at regular intervals.

Other boundaries are imposed by external authorities through legislative and statutory instruments, rules for conduct, cultures, and religion which would include cultural issues and conventions in the domicile in which the business is actively operating.

Clause 4.2.2 of the BMS75000:2020 Business Management Standard requires us to identify and maintain a Business Record of the national and international legal and regulatory requirements that are applicable or deemed to be relative and our business activities. As a result, the BMS75k Business Management Standard recognizes that the Ecosystem in which we operate as a Company must include our compliance with the Legal and Regulatory Requirements.

Compliance with the identified legal and regulatory requirements must be determined and reviewed at planned intervals. The frequency and extent of the compliance review must be recorded as an item within the Business Program.

Clause 4.2.3 of the BMS75000:2020 Business Management Standard covers the Identification of Business Stakeholders and requires the Company to identify all individuals and authorities who are directly and indirectly affected by our business activities including national and international groups, parties, persons, or authorities that can affect, be affected by, or perceive themselves to be affected by a decision the Company makes or activity it manages.

Likewise, the Company must identify all direct and indirect local, national, and international authorities, that can have an effect, or be perceived to influence its business activities and objectives which would be accompanied by a decision or activity they have the authority to make or create. A listing of such Stakeholders to be included consists of:

a)   Shareholders and Investors.
b)   Employees.
c)   Trade Unions and Collective Labor Representatives.
d)   Charities, Trustees, and Authorities.
e)   Customers and End Users.
f)   Suppliers and Subcontractors.
g)   Trade Creditors.
h)   Credit Unions and Credit Agencies.
i)   Local, National and International Authorities.
j)   Strategic Authorities and Professional Institutes.
k)   Statutory and Legislative Authorities.
l)   Customs, Excise, and Revenue Authorities.
m)   National Governments and Unions of Trading Nations.
n)   Banks, Credit Providers, and Other Financial Institutions.

The Company must maintain a suitable register of all persons and stakeholders who are notifiable correspondents in our activities or have an invested interest in the operation of our business and operations as a controlled business record.

Clause 4.2.4 of the BMS75000:2020 Business Management Standard addresses the need to consider Customer Responsibility and Focus as part of the ecosystem. BMS75k requires the customer to be classified as a Key Stakeholder and we are required to recognize customers as such to ensure that customer requirement are determined and are met consistently, to enhance customer satisfaction with the business activities, goods, and services the Company produce, distribute, provide, deploys or is otherwise responsible for.

Executive Management is required to ensure that suitable measurements are taken at planned intervals to assess the perception customers have of the quality of the business activities, including the quality of the goods and services produced and the operation and processes we employ from a customer perspective.

The BMS75000:2020 Business Management Standard requires the Company to consult customers at planned intervals and retain a business record of customer perception.

Suitable and relevant objectives and measurements must be used to monitor customer satisfaction and perception of the business activities. Appropriate action must be taken if planned results are not achieved or must not be achieved within the timescales set.

The specified requirements in **Clause 4.2** of the BMS75000:2020 Business Management Standard provide a solution to the European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition stipulations for an understanding of our ecosystem.

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**BMQS Standard Appendix A Correlation and Cross Reference with the
European Foundation for Quality Management 2020 (EFQM:2020)**

2.0   The EFQM Model Direction Continued

1.3   Understanding of its Own Capabilities (BMS75k 4.1, 4.2, 4.2.1, 4.2.2, 4.2.3, 4.2.4, 6.0, 6.1.4)
The European Foundation for Quality Management 2020 **(EFQM:2020)** Revised 2ⁿᵈ Edition directs us to understand our capabilities and major challenges.

In respect of understanding our Company Capabilities, the solutions can also be found from consideration of **Clause 4.1** which covers
"Understanding the Company and its Relations".

A clear and precise knowledge of our capacity and capability is needed to complete this requirement, for which solutions can be found by following directives in **Section 6.0** of the BMS75000:2020 Business Management Standard. Section 6.0 addresses **Business Planning** and specifically **6.1.4 Process Planning, Management, and Control.**

1.3   Understand its own Major Challenges (BMS75k 6.0, 6.1, 6.1.1, 6.1.2, 6.1.3, 6.1.4, 6.1.5, 6.1.6)
To complete the requirements in 1.3 of Criterion 1 in EFQM:2020 we need to understand the Major Challenges a Company is facing.

The term "Major Challenges" appears only in the Subheading of Clause 1.3 and in the listing for scoring analysis. There is a lack of explanation or definition as to what is meant by a "**Major Challenge**", however, the BMS75000:2020 Business Management Standard **(BMS75k)** offers several solutions to address this requirement within **Section 6** which consists of:

6.0	**Business Planning**
6.1	**Actions to address Risks and Opportunities**
6.1.1	**Risk Identification and Management**
6.1.2	**Make or Buy Analysis and Planning**
6.1.3	**Project Management Planning**
6.1.4	**Process Planning, Management, and Control**
6.1.5	**Outsourcing and Subcontract Planning**
6.1.6	**Goods and Service Planning Analysis and Reviews**

Within this section, all Business activities and issues that are deemed to be insignificant or low risk are viewed as being inherent in the business process and for which provision is already made in the margins and contingencies a Company maintains.

Here the BMS75k standard directs the management to be content to observe and monitor such issues and take no additional action or make new decisions that require the issue to be accommodated, further than the provisions that already exist.

When an issue is **"Project Worthy"** or classified as **"Significant or High-risk"**, it is directed that the issue requires management as a project because it has a foreseeable influence on the strategic business plan, and as such it must be assessed, logged as an issue in the business program, and suitably sentenced as requiring additional resources to process, contain or resolve.

The decision to assign an issue to the business program must be correctly informed and the authority responsible for the circumstances of the occasion must be recorded. This is required so that the event can be simulated at a later stage which may be required to support the decision as being informed and correct. Once the issue is sentenced as relative, and significant, it needs to be included in the Business Program.

Criterion 1 (1.4 Develop Strategy).   (BMS75k 5.0, 5.1, 5.2,)
The European Foundation for Quality Management 2020 **(EFQM:2020)** Revised 2nd Edition requires a Company to develop a Strategy that describes how it intends to fulfill its purpose and host the plans through which to achieve the strategic priorities and move closer to its Vision.

This **"Vision"** describes what we seek to achieve and be seen to be achieved in the long term. It is intended to act as a guide for decision-making by which to select future courses of action. As such the vision and stated purpose become the basis for setting the Business Strategy.

A solution for defining a vision and commending a business strategy can be found in Section 5 which contains **Clause 5.1 (Commitment)**
and **Clause 5.2 (Business Management Policy)** in the BMS75k Standard which also contains:

5.0	**Governance and Commitment**
5.1	**Commitment**
5.1.1	**Teamwork and Engagement**
5.1.2	**Management Commitment**
5.1.3	**Succession Policy and Plan**
5.2	**Business Management Policy**
5.3	**Company Roles, Responsibilities, and Authorities**
5.3.1	**Responsibility and Authority**
5.3.2	**Business Management Representative**
5.4	**Documented Business Management System**
5.4.1	**Business Management Manual**
5.4.2	**Business Management Practices**
5.4.3	**Departments and Practices**
5.5	**Cultural Issues and Conventions**
5.5.1	**Cultural Issues**
5.5.2	**National and International Conventions**

Clause 5.1 of BMS75k requires the Company Executive Management to demonstrate its governance by example, commitment, and respect for stakeholder expectations and the requirements of the Business Management System. This must be achieved by confirming that the Business Management Policy and Objectives are assured and understood, in keeping with the Company's Strategic Policy and intentions.

Note: The Company Vision is sometimes known and referred to as a mission or mission statement in the Documented Business Management Procedures.

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BMQS Standard Appendix A Correlation and Cross Reference with the
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2.0   The EFQM Model, Direction.

Criterion 1 (1.4 Develop Strategy) Continued.   (BMS75k 5.0, 5.1, 5.2)

The Business Management Policy contains and communicates our Company Vision in **Clause 5.2** of BMS75k which requires the Company Executive Management to create and publish a Business Management Policy that:

a)   Is in keeping and aligned with our purpose,
b)   Contains a mandate for establishing and measuring Business Management Objectives,
c)   Contains an acknowledgment of responsibility for the recognized Business Management requirements
d)   Contains the obligation to continually improve the effectiveness of the Business Management System,

The Business Management policy must be:

e)   Documented, controlled, and accessible
f)   In a language and format that is understood by all stakeholders,
g)   Reviewed at planned intervals for continuing suitability,
h)   Retained in a format that can be communicated to all other interested parties as appropriate
i)   Responsive to the needs and aspirations of those affected by our business activities.

Criterion 1 (1.5 Design & Implement a Governance & Performance Management System)
(BMS75k 0.1, 5.0, 5.1, 5.3, 5.3.1, 5.3.2, 5.4, 5.4.1, 5.4.2, 5.4.3, 5.5.2, 9.1.3)

EFQM:2020 requires the Company to design and implement a Governance and Performance Management System, containing a framework of authority and control within an organization used to help it fulfill its legal, financial, ethical, and general stewardship obligations.

This directive in EFQM:2020 is best served by dividing the requirement into two aspects:

a)   Having and effectively implementing a management system,
b)   Ensuring it is directed at the subjects of Governance and Performance,

Here again, the EFQM:2020 provides no directives other than to list this as a requirement in Criterion 1 under subheading 1.5 and in the scoring analysis. The BMS75000:2020 Business Management Standard provides solutions in Clause 5.4 which covers:

5.4   Documented Business Management System
5.4.1   Business Management Manual
5.4.2   Business Management Practices
5.4.3   Departments and Practices

5.4 DOCUMENTED BUSINESS MANAGEMENT SYSTEM

The BMS75k Standard requires us to determine, record, operate, and continue a Business Management System and develop the effectiveness of its operations and activities by complying with the Business Management Standards specified requirements. The documentation derived from the Business Management System shall recognize and comply with customer and applicable statutory and regulatory requirements in the policies, processes, and documented practices. In this respect, we must anticipate, assess, accommodate, analyze, and account for the operation of the Business Management System by:

a)   Deciding on the most suitable practices needed for the system's correct and effective operation,
b)   Decide on the most suitable sequence or separation of these practices,
c)   Decide on the most suitable metrics to report on and control,
d)   Select the most appropriate measurements to report and use,
e)   Decide on what resources and know-how are needed for the operation and effectiveness of the system,
f)   Ensure such resources and know-how are available when the system requires them,
g)   Analyzing and accounting for the product of the Business Management processes, and
h)   Deciding when actions must be taken to achieve planned results and improve the practices.

These Business Management practices must be used and deployed following the specified requirements of the Business Management Standard. Outsourcing any practices or process that contributes to a business activity or those parties affected by our activities and operations, must comply with the provisions of clause 6.1.5 which covers **Outsourcing and Subcontract Planning,** to ensure control is maintained and effective. Principle Business Management System documentation includes:

i)   Strategic Business Plan **(See 6.2.2)**
j)   Sub-layer Business Plans that support and communicate the Strategic Business Plan **(See 6.2.2)**
k)   Commitment and declaration of a Business Management Policy **(See 5.2)**
l)   Commitment and specification of Business Management Objectives, **(See 6.2.1)**
m) Documented Business Management Policy Manual, **(See 5.4.1).**
n)   Defined practices and records specified in this Business Management Standard **(See 5.4.2)**
o)   Defined and authorized Business Plans and Programs **(See 6.2.2)**
p)   Defined instructions or practices, records, or information needed to ensure the effective planning, operation, and control of the Business Management processes and systems **(See 5.4.2)**,

We ensure that personnel and stakeholders have access to, and are aware of, all relevant Business Management System documentation and details of all completed or intended changes.

> *NOTE 1*   *Within this Business Management Standard there is a clear directive for "documented practices" When a clause includes these words, then practice must be documented or an equivalent method, for the subject the clause defines. (See Clause 5.4.)*

> *NOTE 2*   *Business Management System documentation can be defined and structured to reflect the operation and the orientation of the business activity and markets. This structure must accommodate the Company size and the type of business activities performed, together with the intellectual property, know-how, experience, and known ability of employees and management.*

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2.0   The EFQM Model, Direction.

Criterion 1 (1.5 Design & Implement a Governance & Performance Management System)
(BMS75k 5.4,5.4.1, 5.4.2, 5.4.3) Continued.

Clause 5.4.1 of the BMS75000:2020 Business Management Standard specifically requires the development and implementation of a Business Management Manual which the Company must create and comply with. This Business Management Manual must include:

a)   Boundaries of the Business Management System,
b)   Explanations for not adopting a specified provision of the standard
c)   Reference or a listing of the documented and defined practices established for the Business Management System,
d)   A description of the integration or separation between the processes of the Business Management System.

When the Business Management System cannot accommodate or include a specified requirement of the Business Management Standard, a statement of exclusion can be included in the Business Management Manual immediately following a definition of the management systems scope. For such exclusions to be permissible, due to the nature of the business activities, our orientation, technology, process, or property, a valid and acceptable statement justifying the exclusion must be recorded. These must be limited to subjects within Clause 8 of the BMS75k standard and the decision documented and recorded as a controlled business record.

Clause 5.4.2 of the BMS75000:2020 Business Management Standard covers Business Management Practices and requires that all subjects that are core activities and significant to the business activities or the continued operation of the Company must be documented in written form or an equivalent method and controlled following the provisions of the Business Management Standard. Each business process contained or referred to in the Business Management Manual must be the subject of or included in, a documented practice.

Practices must be documented or an equivalent method, to establish and communicate administrative, specific, and operational or instructive requirements. They shall also be required to provide a common point of reference for activities and decisions that are similar or identical practices being undertaken by two or more resources, managers, departments, or assessors at similar times, events, activities, or circumstances.

Note: *Equivalents to documenting a business practice can include electronic media such as computer programs, spreadsheets, database screens, flow charts, slide presentations, videos, and recordings provided they can adequately convey to the persons tasked with compliance what they are required to use, the process to be followed and what needs to be produced or completed.*

Where appropriate and relative to the Company, documented practices can consist of and include:

a)   Administrative practices are documented and communicated to convey the business and departmental processes where the sequence of activities is significant and are recognized as being principal activities within the Company.

b)   Specific practices documented and communicated to address a specified requirement for a documented practice within the Business Management Standard or where the Company considered a subject would benefit from being communicated in a documented practice.

c)   Task Instructions are used to give specific instructions for individual tasks and duties, required to be undertaken consistently by more than one person, department, area, or branch of the Company.

d)   Work Instructions to detail requirements for individual items of work needed for the effective operation and control of business processes, product realization, and services supplied or undertaken by the Company.

e)   Documented guides are used to convey or record advice and instruction to support the operation, training, and management practices derived from previous experience or know-how.

A register of Business Management practices must be maintained together with the details of changes and revisions for each documented practice registered. This register and its contents must be recognized as a controlled business record.

Clause 5.4.3 of the BMS75k Standard covers Departments and Practices for which the management and departmental structure of the Company can be detailed in the Business Management Manual in a written or diagrammatical statement. This must show the departmental structures of the Company and the reporting conventions employed towards its Executive Management.

Where appropriate, each identified department must be the subject of a Documented Administrative Practice which must contain, but not be limited to:

a)   Department Title and Responsibilities,
b)   Inputs to the department and their source,
c)   List of practices, tasks, and duties performed,
d)   Reference to documented specified practices for which it is responsible,
e)   Details of department outputs and their intended recipient, and
f)   Metrics and objectives by which the effectiveness of the department can be determined.

All the department practices, metrics, and objectives must be recorded under the Company culture and contribution to the Strategic Business Plan. These are recognized as controlled business records.

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BMQS Standard Appendix A Correlation and Cross Reference with the
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2.0   The EFQM Model Direction Continued

Governance & Performance

The subject of Governance is directed in the BMS75k Business Standard under the following Clause References:

0.1	**Introduction, General**
5.0	**Governance and Commitment**
5.1	**Commitment,**
5.3	**Company Roles, Responsibilities, and Authorities**
5.3.1	**Responsibility and Authority**
5.3.2	**Business Management Representative**
5.4	**Documented Business Management System**
5.5.2	**National and International Conventions**
9.1.3	**Shareholder Perception Evaluation**

Note: *Guidance on corporate governance management systems can also be taken from ISO 31000 and ISO 22301*

Clause 0.1 of the BMS75000:2020 Business Management Standard (BMS75K) introduces the standard and its prime purpose relative to the need for good and consistent governance. It states that the BMS75000:2020 Standard has been prepared for guidance on what constitutes a Business Management Standard based on the established and recognized national and international best business practices for business conduct, accountability, and social and corporate governance.

Clause 5.0 of BMS75k is dedicated to this subject under the title of **5.0 Governance and Commitment.**

Clause 5.1 covers the need for commitment requiring the Executive Management to demonstrate its governance by example, commitment, and respect for stakeholder expectations and the requirements of the Business Management System. This is to be achieved by:

a) Confirming that the Business Management Policy and Objectives are assured and understood in keeping with the Company Strategic Policy and intentions,
b) Confirming the Business Management System requirements are integrated with Company Business Practices,
c) Providing the Business Management System resources needed for the effectiveness of the,
d) Promoting within the Company, the importance of an effective Business Management System,
e) Presiding over the managements conformance with Business Management System and its requirements,
f) Ensuring business practices and the results achieve the agreed required objectives and outcomes,
g) Supporting those who are tasked with developing the effectiveness of the Business Management System,
h) Advocating continuous and permanent business activity improvements,
i) Assisting management at all levels, with the governance and stewardship of their areas of responsibility,
j) Communicating the importance of business activities that are core to the purposes of the Company's existence.

Clause 5.3 addresses the need for Company Roles, Responsibilities, and Authorities and requires Executive Management to display governance and identify with the principal activities of the Company by ensuring that appropriate responsibility and authority for the principal activities are assigned to competent executives supported by trained and competent staff.

In addition, the Executive Management must provide evidence of its governance and commitment to the development and implementation of the Business Management System by continually improving its effectiveness.

Clause 5.3.1 of BMS75k covers the requirement addresses the Responsibility and Authority of the Executive Management to delegate and assign responsibility and authority to competent executives and trained managers who are sufficiently empowered to:

a)   Ensure that the Business Management System conforms to the requirements of this Business Management Standard,
b)   Report effectively and accurately on the performance of the Business Management System to Executive Management and stakeholders,
c)   Ensure the conduct and practices of Business Management within the Company, are accountable, correct, and defendable at all times.

Clause 5.3.2 of BMS75k introduces the **Business Management Representative** which is a significant requirement and appointment for the operation and transparency of the company governance and performance.

This clause requires the Executive Management to provide for a non-executive officer to fulfill the position of a Senior Management Representative operating at a senior level in the Company and recognized as a steward of the Business Management System. The Senior Management Representative non-executive officer's duties include:

a)   Confirming that activities and business practices needed for the Business Management System are determined, operated, and consistent in use and application throughout the Company,
b)   Consulting with the Executive Management on matters of Business Management System performance and the need for change,
c)   Confirming the identification and promotion of best practices in Business Management throughout the Company.
d)   The freedom and unrestricted access to Executive Management, Stakeholders, and Records, to resolve Business Management issues.

NOTE: *The Business Management representative is recognized as the answering and communicating authority to external parties and authorities on all matters relating to the Business Management System, the Business Ethics, and the Conduct of the Company and its Management.*

Clause 5.5.2 of BMS75k covers requirements for consideration of National and International Conventions which is an essential consideration when evaluating the fringe considerations in the company claims for governance.

It requires the Company to identify and comply with all relative and appropriate National and International conventions which it is required to, or has elected to, recognize, and comply with or support, due to statutory and legislative instruments or strategic choice and policy.

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2.0   The EFQM Model Direction
Governance & Performance Continued
Clause 9.1 of BMS75k covers requirements for Stakeholder perception and evaluation and incorporates:

9.1.1   Monitoring and Measurement of Processes
9.1.2   Monitoring and Measurement of Goods and Services
9.1.3   Shareholder Perception Evaluation
9.1.4   Customer Satisfaction and Perception Evaluation
9.1.5   Employee Perception Evaluation
9.1.6   Supplier Perception Evaluation
9.1.7   Stakeholders' Perception, Expectations, and Satisfaction

Clause 9.1.3 of BMS75k covers requirements for Shareholder Perception Evaluation and provides for the measurement and analysis of a company's governance credentials. It requires the organization to anticipate, assess, accommodate, analyze, and account for shareholder perception of its business activities, conduct, and performance where applicable. The methods for obtaining and using this information must be determined by a documented practice.

Executive Management is to be informed as to the perception of its shareholders and be accountable for Company performance and Corporate Governance practices. Shareholder involvement must be encouraged by ensuring effective and timely communication is demonstrated with shareholders and include

a)   Ensuring that senior management has in place both a prevention and reaction strategy
b)   Shareholder base is known and who are the active mainstream investors
c)   Shareholder concerns and issues are known and dealt with effectively and timely
d)   Company performance is assessed against competitors by use of key metrics
e)   Communication with shareholders is effective
f)   Key priorities of management, realistic benchmarks, and milestones reflect the concerns and expectations of all shareholders.

Analysis of shareholder perception must be by way of proven methods and use where possible, independent, and external means of collection and identification of data to compare with known shareholder expectations.

Records must be produced and maintained for monitoring, measurement, analysis, and evaluation of shareholder perception which is recognized as a controlled business record.

2.0   The EFQM Model Direction
Criterion 2:   Organisational Culture and Leadership.
The European Foundation for Quality Management 2020 *(EFQM:2020)* Revised 2nd Edition in **Criterion 2** lays down the requirement for Organizational Culture & Leadership. It directs the Company to examine its own culture which is defined as a collection of values & norms known to be understood and shared by people or groups within the Company that influences the behaviors of the Company internally and with external Key Stakeholders who exist and operate outside the organization.

It also directs the requirements for leadership which relate to the Company as a whole rather than any executive or board member that provides direction from the top. Here the EFQM:2020 is directing the Company to become a leader in its own right from within its ecosystem and requires the Company to conduct its business activities in a manner that must be recognized by others as an example of best business practice or exemplary in its field of operations.

> *Note:*   *This must not be confused with the traditional understanding of leadership coming from top management to example and encourage good practice and mission within the internal operations of the Company.*

EFQM:2020 promotes the concept that in an outstanding organization, leadership is an activity and not a role. In this respect Company, leadership behaviors must be evident across all levels of the Company within its chosen or recognized vocations. This Company Vocational Leadership and Business Conduct must be directed at inspiring other contemporaries in the industry and commercial sectors, to follow the example set by the Company. It also reinforces, the credibility of the targets and metrics used, to steer the Company Culture.

The European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition directs the subject of Organizational Culture and Leadership into 4 Criterion Subsections consisting of:

2.1   Steer the Organization's Culture & Nurture Values
2.2   Create the Conditions for Realizing Change
2.3   Enable Creativity & Innovation
2.4   Unite Behind & Engage in Purpose, Vision & Strategy

Criterion 2 (2.1 Steer the Organization's Culture & Nurture Values).   (BMS75k 4.5, 5.4.3, 5.5, 6.4, 9.1)
EFQM:2020 requires a Company to steer its Culture and Nurture Values which is best served by dividing the requirement into two individual aspects:

a)   Organizational Culture Steering,
b)   Nurturing Credible Business Values,

Solutions for Organizational Culture Steering can be found in the following clause of the BMS75000:2020 Business Management Standard:

4.5   External Business Considerations
5.4.3   Departments and Practices
5.5   Cultural Issues and Conventions
6.4   Management of Change
9.1   Monitoring, Measurement, Analysis, and Evaluation

Practicing and fulfilling these requirements assist the Company to define what its vocational culture is, what it is perceived to be by its stakeholders, and what we and they would like it to be in the short- and long-term future.

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BMQS Standard Appendix A Correlation and Cross Reference with the European Foundation for Quality Management 2020 (EFQM:2020)

2.0   The EFQM Model Direction.
2.1 Steer the Organization's Culture & Nurture Values.   (BMS75k 4.5, 5.4.3, 5.5, 6.4, 9.0, 9.1, 9.1.7)

Steering the Organizational Culture

Here again, the EFQM:2020 provides no directives other than to list this as a requirement in Criterion 2.0 under subheading 2.1 and in the scoring analysis. It does however direct the Company to examine its own Culture and Values which influence the behavior of the Company internally and with external Key Stakeholders who exist and operate outside the organization. EFQM 2022 also stipulates the need for a professional internal communication and strategy deployment based on the premise of **"communicate with head, heart, and hand."** Comprehensive communication, it is claimed, has been instrumental in the successful onboarding of all employees around conducting change and improvement. It defines culture as the specific collection of values and norms that are shared by people and groups within an organization that influence, over time, the way they behave with each other and with Key Stakeholders outside the Company.

The BMS75000:2020 Business Management Standard provides solutions to these requirements under Clauses 4.5, 5.4.3, 5.5, 6.4 as listed above, but first, we must identify what the company culture is and what we and our stakeholders would like it to, be for which **Section 9.0** of BMS75k provides both specification and solutions within its subjects which are:

9.0	**Business Performance Evaluation**
9.1	**Monitoring, Measurement, Analysis, and Evaluation**
9.1.1	**Monitoring and Measurement of Processes**
9.1.2	**Monitoring and Measurement of Goods and Services**
9.1.3	**Shareholder Perception Evaluation**
9.1.4	**Customer Satisfaction and Perception Evaluation**
9.1.5	**Employee Perception Evaluation**
9.1.6	**Supplier Perception Evaluation**
9.1.7	**Stakeholders' Perception, Expectations, and Satisfaction**

Under **Clause 9.0** the Business Performance must be evaluated. It requires the Company to review the performance of the Business Activities against the Strategic Business Plan at planned intervals following a documented practice and the provisions of the Business Program. The review must include:

a)   Strategic Business Plan and its relevance to current activities.
b)   Effectiveness of Sub-layer Business Plans and the reported achievements.
c)   Business Program and its contents.
d)   Results taken from monitoring, measurement, analysis, and evaluation of business performance.
e)   Results and information derived from Internal Management Audits.
f)   Actions arising from management reviews.
g)   Actions were taken to address risks and opportunities.

The Company is directed to test and report on the effectiveness of:

h)   Risk identification and management
i)   Make or buy decisions and their analysis
j)   Research and development activities
k)   Design and selection activities
l)   Project management planning and achievements
m)   Process planning, management, and control
n)   Outsourcing and subcontract planning
o)   Goods and service planning
p)   Business analysis and planning
q)   Market analysis and planning
r)   Sales forecasting and realization
s)   Financial analysis and planning
t)   Budget management and cost control

Based on the above, the Company is required to review:

u)   Current business objectives and the effectiveness of plans to achieve them
v)   Changes to the Strategic and Sub-layer Business Plans
w)   Proposed changes to the Business Objectives and Goals
x)   Plans and Provisions for Business Continuity

In determining and evaluating the effectiveness of the business activities and practices, account must be taken of the timeliness at which tasks and reports are completed, and their accuracy when compared against plans and objectives to which they relate or contribute. Records of the review must be maintained and recognized as a controlled business record.

Under **Sub-Clause 9.1.7** the Company is required to evaluate Stakeholders' Perceptions, Expectations, and Satisfaction. The performance of the Business Management System, in respect of the Company's obligation to its stakeholders must be monitored and reviewed which is taken from the collection and analysis of information relating to stakeholder perception assessed by use of the Company's internal measures and actual perceptions provided by the stakeholders themselves. These must be compared with those of other organizations when applicable. The methods for obtaining and using this information must be determined by following a documented practice.

The Company is required to develop and implement plans for stakeholder perception improvement that address deficiencies identified by these evaluations and assess the effectiveness of the results from Monitoring stakeholder perception. All records produced or maintained of monitoring, measurement, analysis, and evaluation of stakeholder perception must be recognized as a controlled business record.

These records and reports produced from practicing and fulfilling the requirements assist the Company to identify and answer what its vocational culture is, what it is perceived to be by our stakeholders and what we and they would like it to be in the short- and long-term future which fulfills the EFQM Model directive to Steer the Organization's Culture under Criterion 2.1.

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BMQS Standard Appendix A Correlation and Cross Reference with the
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2.0   The EFQM Model Direction.
2.1 Steer the Organization's Culture & Nurture Values.   (BMS75k 5.0, 5.1, 5.1.2, 6.2, 6.2.1)

Nurturing Values

The European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition requires a Company to nurture its values and here we need to first identify what they are and what is meant by values. When discussing people's engagement and commitment within any organization, the EFQM 2022 calls for the company to implement a strong management culture based on the company's values (Attentive, Open, and Committed) to define its stance and behavior toward customers and other stakeholders.

As stated previously, EFQM 2022 also stipulates the need for professional internal communication and strategy to be deployed based on the premise of "communicate with head, heart, and hand." Comprehensive communication, it is claimed, has been instrumental in the successful onboarding of all employees in conducting change and improvement. In addition to culture, it also calls for integrity which it defines as the quality of having a strong moral or ethical code. This includes commending values such as respect, fairness, trustworthiness, and honesty.

Finally, the EFQM:2020 stipulates that "Values" are the operating philosophies or principles that guide a Company's organization's internal conduct as well as its relationship with the external world. Values guide people on what is good or desirable and what is not. They exert a major influence on the behavior of individuals and teams and serve as broad guidelines in all situations.

Whilst these views are commendable, we do need to have solutions in the form of metrics and targets to measure how the company culture is derived from and maintains its values. Such values are reasonable expectations of any business; however, the degree of application, positioning, and priority are unique and often specialist due to the technology and management style developed and deployed in business affairs.

As previously stated, the BMS75000:2020 Business Management Standard recognizes under **Clause 0.4 of its introduction** that a Company must be formed to fulfill a specific purpose in society and that purpose drives everything a Company does. The survival and continuity of a Company must depend greatly on its purpose which needs to be accepted by the society in which it operates. Business performance is not just assessed against economic performance or profit, but its conduct and contribution to matters of environment and welfare are equally important to its stakeholder. Companies of any type must be aware and concerned with their ecological and social performance in addition to financial welfare. In all companies, economics must be a restraint on what is done and what its managers can do, it cannot, therefore, be its sole objective.

The BMS75000:2020 Business Management Standard provides solutions to these requirements and expectations under **Clause 5.0** which has been discussed in connection with **Criterion 1.4** Develop Strategy and **Criterion 1.5** Design & Implement a Governance & Performance Management System but in respect of setting and nurturing core values, **Section 5.0** containing **Clause 5.1. and 5.1.2** which have significant directives for solutions to the problem of identifying and nurturing the company's core values. This requires:

5.1 COMMITMENT The Company Executive Management is required to demonstrate its governance by example, commitment, and respect for stakeholder expectations and the requirements of the Business Management System which includes confirming that the Business Management Policy and Objectives are assured and understood in keeping with the Company Strategic Policy and intentions, and Confirming the Business Management System requirements are integrated with Company Business Practices, and communicating the importance of business activities that are core to the purposes of the Company's existence.

5.1.2 Management   Executive Management is required to provide evidence of its commitment to the development and implementation of the Business
Commitment   Management System with support and resource for the continual improvement of the system and communicating to all employees the importance of identifying and meeting stakeholder requirements and expectations as well as complying with statutory and regulatory requirements. Employees and management shall be empowered, within defined limitations, to undertake and complete the tasks they are assigned in keeping with their known delegated authority and capabilities.

The EFQN:2022 has described values as the operating philosophies or principles that guide an organization's internal conduct as well as its relationship with the external world. Values guide people on what is good or desirable and what is not. They exert a major influence on the behavior of individuals and teams and serve as broad guidelines in all situations.

As such, these values are attributes that must be reflected in the company's strategic plans and business objectives. The BMS75000:2020 Business Management Standard provides solutions in the form of Business Objectives which is discussed in **Clause 6.2.** This requires a Company to select its Business Objectives for each level of management or individual department and the collective interest of the Company as a whole. The selection and promotion of such objectives must be recorded as a controlled business record, and be:

a)   In keeping with Business Policy
b)   Suitable, calculable, appropriate, and time based
c)   Responsive in addressing stakeholders' concerns and requests
d)   Measured and the results collected, analyzed, and made available,
e)   Published in an understandable fashion,
f)   Changed when required after thorough technical evaluation
g)   Reviewed to identify opportunities for improvement potential and
h)   Used for the purpose of business development

The Company must complete and maintain a controlled business record of the objectives and the results obtained. The practices for business objectives and plans must be the subject of a documented practice or an equivalent method. Additional solutions are available from **Clause 6.2.1**

6.2.1 Business   Executive Management shall ensure that business objectives, including those needed to meet requirements for the Company's goods or
Objectives.   services are established at relevant functions and levels within the Company. The business objectives shall be measurable, consistent and traceable to directives within the Company Business Policy. Each business objective shall have clearly defined targets that shall be suitable, measurable, achievable, and time-based. Objectives shall be used to monitor and check each principal activity that is core to the operation and continuation of the Company. These core business objectives must be used to measure the correctness and timeliness of the process involved and their activity. Each objective must be identified with its process and be a constituent and reporting item within the Company's continuous improvement plan. Objectives are recognized and referred to in the process effectiveness evaluation reports as a controlled business record.

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**BMQS Standard Appendix A Correlation and Cross Reference with the
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2.0 **The EFQM Model Direction.**

Criterion C2: 2.2 Create the Conditions for Realizing Change   (BMS75k 6.4, 6.4.1, 6.4.2, 6.4.3,)

The European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition is very concerned with the correctness and management of change which it maintains all companies and organizations must have to face as an ever-increasing issue of speeds and volumes of change and that they have to be prepared to anticipate, address and respond appropriately by embracing the challenge of managing for today, and at the same time, forecasting the future and making sure it is prepared for what happens which may or may not directly affect their business activities.

The leading organization must acknowledge that Key Stakeholder needs may change over time and that it is important to collect and analyze feedback to improve or change their products, services, and solutions. In addition, there are constant changes inside and outside the organization that need to be managed in parallel if it is to remain successful and in business.

EFQM2022 defines the management of change as an approach for leading the transition of individuals, teams, and organizations from their current state to a defined desired future state. It is an Organisational process aimed at helping those stakeholders affected by the change to understand, accept, and embrace it.

The BMS75000:2020 Business Management Standard can identify with these provisions and provides solutions for the management of change throughout the standard and particularly under **Clause 6.4** which is dedicated to the management of change and contains:

> **6.4**   **Management of Change**
> **6.4.1**   **Indigenous Change Preparation and Management,**
> **6.4.2**   **External Change Preparation and Management,**
> **6.4.3**   **Planning and Accommodating Unforeseen Issues,**

The acknowledgment of the need for change originating inside the company and factors which change outside the business by the EFQM:2022 module finds direct solutions from the BMS75000:2020 Business Management Standard. **Clause 6.4** requires a Company to develop and maintain a documented practice to manage indigenous, foreseeable, and unforeseeable changes needed to improve, direct, or accommodate a change in its Business Management System and Business Objectives.

The documented practice must cover indigenous changes arising from the operation of the Business Management System, which present changes needed to complement, advance, or are advantageous to the Business Management System and the core purpose and interests of the Company.

This management of change document practice is required to contain a prescription for the identification and monitoring of known external matters which affect the current interests or operations within the Company over which the Company has no direct control but maintains the knowledge and intelligence needed to recognize when there is movement in their direction or occurrence.

The prescription must set out a standard practice to recognize when known external matters require changes to be made within the Company activities. The documented practice must also contain a prescription to recognize the occurrence of unforeseeable events which impose a change on the Company's Business Management System or its agreed objectives.

These unforeseeable matters cannot be anticipated or planned for because they are:

> a)   Beyond the realm of regular plausible expectations,
> b)   Beyond the Company's influence to control or prevent,
> c)   Explanations for changes or direction can only be made after the event,
> d)   Only rationalized by way of hindsight.

When changes to the company's Business Management System are required due to indigenous, foreseeable, or unforeseeable events, their introduction must be authorized at the appropriate level, planned, recorded, and communicated.

All changes to the Business Management System must be introduced under a controlled management practice and must only proceed after completing a thorough and full technical evaluation of the known and foreseeable events and consequences resulting from the change.

In addition, there are constant changes inside and outside the organization that need to be managed in parallel if it is to remain successful and in business.

Changes must be communicated to all affected or interested parties and functions, to prevent inconsistency between policy, procedure, practice, and record. This is to ensure the integrity of the Business Management System is maintained at all times, for control and continuity of the Company objectives and purpose.

Accountability for all change results, and decisions, must be determined and recorded to ensure all matters are traceable to the authorities tasked with the decisions made, and that decisions made are defendable at all times and tractable to the records and information available at the time of a decision, and on which decisions were reached.

Completion of a change to the Business Management System must be incorporated into the company practices for configuration control and must be reflected in the build standards for the products and services provided.

Records must be produced and maintained of all change management decisions and be recognized as a controlled business record.

As a leading organization, the Company must acknowledge that Key Stakeholder needs may change over time and that it is important to collect and analyze feedback to improve or change products, services, and solutions.

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2.0   The EFQM Model Direction.

Criterion 2: 2.2 Create the Conditions for Realizing Change   (BMS75k 6.4, 6.4.1, 6.4.2, 6.4.3,)

The European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition requires a company to be prepared for change and to anticipate, address and respond appropriately by embracing the challenge of:

a)	Managing changes for today,	*Indigenous Change Management*
b)	Forecasting changes for the future	*External Change Management*
c)	Preparing for what may or may not change in the business activities.	*Unforeseeable Change Management*

The EFQM:2020 requires a Company to acknowledge changes in Key Stakeholder needs and that it is important to collect and analyze feedback to improve or change its products, services, and solutions. In addition, there are constant changes inside and outside a Company that needs to be managed in parallel if it is to remain successful and in business.

6.4.1 Indigenous Change Preparation and Management

BMS75k requires that the management of change must be the subject of a documented practice, containing planned and continuous assessment and review of the Business Activity. This must be used to determine compliance and correctness of the Business Management System with this Business Management Standard or if changes are required. These changes include as appropriate:

a)   Changes to Business Practices and Company Structure;
b)   Changes in Policy and Responsibility;
c)   Changes to Procedures or Documented Practices;
d)   Changes derived from Audits, Checks, and Reviews;
e)   Improvement Management Plans;

Indigenous change planning and preparation must be applied to matters over which the Company has the most control and influence. This includes:

f)   Change in the scope of the Business Management System;
g)   Policy changes or amendments;
h)   Product and service change;
i)   Process change;
j)   Procedure change;
k)   Change in Employee skills and know-how;
l)   Change in Management style and structure;
m)   Changes in capacity and output.

All indigenous changes to the Business Management System must be authorized at the appropriate level, evaluated as suitable and appropriate, and registered in a revision under the established and documented configuration control practices of the organization.

6.4.2 External Change Preparation and Management

BMS75k requires that the Company identifies and determines the extent, to which all foreseeable external changes can affect its own planned objectives and current business program. These must be monitored and observed as to the extent and influence they have on the Company's business activities.

Each assigned authority must become conversant with the sources, consequences, and influence of such matters, and provide for their mitigation by way of contingencies within their contributions to the company's strategic plan. This must be incorporated and completed as part of the Company practices for risk management.

The Company must also identify the relevance and degree to which any external activity affects its practices and objectives. This includes the degree to which the subject influences, benefits, or detracts from the current business program and the strategic plan. The Management of Change documented practice must include the recognition of external subjects that require the Company to have knowledge and intelligence of their stability, constancy, or volitivity and the subsequent consequence and relationship to the Company Objectives.

The selection and monitoring of all known relative external subjects and issues must be determined by their relationship with Company Objectives or the degree to which their conduct and passage can compromise an aspect of the Business Management System.

Changes in these issues and the need for action depend on:

a)   Relationship of the issue to a company objective or practice,
b)   The extent to which changes require adjustments to internal company matters,
c)   Changes being within the realm of regular plausible expectations,
d)   An internal ability to accommodate. influence or prevent detriment,
e)   An internal ability to realize a benefit from a change or development,
f)   Change frequency, predictability, or likelihood,
g)   Know-how and intelligence of the scope and boundary of the issue,
h)   Degree and extent to which mitigation methods can be applied,
i)   The strategic decision to act when limits have been reached or exceeded.

The Company must recognize at the earliest possible stage when an external matter or occurrence must impact the Business Management System.

Consideration given to the event must be recorded and registered. The register can be used to record all relative matters which have a known influence on the realization of Business Objectives and the Business Management System. This must be maintained as a controlled business record.

A review of all registered matters must be provided within the company Business Program. The degree to which these matters influence the selections of business objectives and the planned action required for their mitigation must be the subject of the company's own risk management systems.

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2.0   The EFQM Model Direction.

Criterion 2: 2.2 Create the Conditions for Realizing Change   (BMS75k 6.4, 6.4.1, 6.4.2, 6.4.3,)

6.4.3 Planning and Accommodating Unforeseen Issues

BMS75k requires a Company to recognize and identify unforeseen issues consisting of events and occasions that impact its Business Management System and objectives, at the earliest possible stage. Unforeseeable issues are those events or occasions that have occurred which are outside of the scope of the Company Business Management System but are having or going to have an effect or influence on the Company objectives. Such unforeseen external issues must only be deemed to be unforeseeable when the issue impacts significantly and directly on the planned business arrangements of the company, and are proven to be:

a)   Beyond the realm of regular plausible expectations,
b)   Beyond the Company's influence to control or prevent,
c)   Explanations for conduct or direction can only be made after the event,
d)   Only rationalized by way of hindsight,
e)   Its influence on company interests was not a reasonable conclusion.

A Company must determine the extent to which all these unforeseeable issues affect its planned business program and core purpose. Each assigned authority needs to become conversant with the issue and prepare recommendations for subsequent consideration, approval, and authorization at the appropriate level.

Matters and decisions taken outside of the Company by National and International Authorities can have an impact or influence the ability of the Company to realize its business objectives. These are identified as Exogenous or External Issues typical examples are the application of taxes or tariffs on the goods or services that a Company produces, purchases, or provides.

Their identification, analysis, and assessment commence with acknowledging the relevance of an unforeseen external event, and provision for addressing its implications is provided, within the business program. The review of relative unforeseeable issues can include:

f)   Adequacy of current political risk and other relative insurance,
g)   Supply chain and logistical operations,
h)   Finance liquidity, banking strategy, and access to domestic currency,
i)   Tailoring the nature of the business to the nature of the risk, and specifics of the market.
j)   Regular advice and consultation from informed authorities,

Unforeseen external issues include matters arising from local, domestic, national, and international events and impositions which prevent or interfere with the current company Business Program including changes in:

j)   Culture and convention expectations and compliance,
k)   Statutory or legislative requirements and stipulations,
l)   Government and religious expectations and compliance,
m)   Alignment of business risk and challenges with the strategic plan,
n)   Conduct and integrity of business activity in global operations.

There is no universal solution to situations when national or international political risks start interfering with business plans. Risk management in general is a very sensitive and complex concept that requires a unique approach to every single issue.

Political risk insurance can be considered for the protection of businesses and international companies that operate within developing economies. Provision exists in such arrangements for protection in the event of acts of expropriation, political unrest and violence, war and terrorism, capital repatriation, and sovereign debt default.

Supply chain considerations in single-sourced arrangements can expose a business activity to detriments which include increased tariffs, trade bans, and delivery delays.

Consultation authorities can include Chambers of Commerce, Embassy Trade Counters, Credit & International Business Association, Globe Risk International, and Multilateral Investment Guarantee Agency.

2.0   The EFQM Model Direction.

Criterion 2: 2.3 Enable Creativity & Innovation (BMS75k 8.3, 8.3.1, 8.3.2, 8.3.3, 8.3.4, 8.3.5, 8.3.6, 8.3.7, 8.3.8, 8.3.9,)

The European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition requires a Company to foster creativity and innovation. It defines creativity as an ability to move away from current rules, methods, and relationships to generate ideas for new or improved processes, products, services, solutions, systems, or social interactions. Innovation is defined as a practical translation of ideas into new or existing products, services, solutions, processes, systems, organizational structures, or social interactions. Effectively directing a company to progress by using and encouraging imagination and new ideas in all strata of the management and workforce from the executive down to the executioner.

The solution for this requirement can be found in the BMS75000:2020 Business Management Standard within **Section 8.3** which covers the subject of **Research and Development** and contains the following**:**

8.3   Research and Development Business Activities
8.3.1   Research Business Activities
8.3.2   Development of Business Activities
8.3.3   Research and Development Planning
8.3.3.1   Research and Development Authorization
8.3.3.2   Research and Development Project Plan
8.3.3.3   Commercialization Strategy
8.3.4   Research and Development Projects
8.3.5   Research and Development Inputs
8.3.6   Research and Development Outputs
8.3.7   Research and Development Results and Records
8.3.8   Research and Development Assessment
8.3.9   Research and Development Accountability

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2.0   The EFQM Model Direction.

Criterion 2: 2.3 Enable Creativity & Innovation (BMS75k 8.3, 8.3.1, 8.3.2, 8.3.3, 8.3.4, 8.3.5, 8.3.6, 8.3.7, 8.3.8, 8.3.9,)

BMS75k requires a Company, to address and document requirements and objectives for research and development when research and development are identified within the Strategic Business Plan, as a principal business activity.

When a principal activity, Research, and Development must be anticipated, assessed, accommodated, analyzed, and accounted for by the orientation of the Company, its technology, range of goods and services, and the experience of the assigned research and development authorities at its disposal.

A Company is directed to document the research and development of business practices to include the research and evaluation of innovative and new developments as well as the replacements for current goods and services provided by the Company and the requirement for new goods and services developments required to realize the sales and marketing objectives.

8.3.1 Research Business Activities.

Research can be recognized as an innovative business activity with the freedom to explore new options but directed by the strategic orientation of the Company. It is required to enquire into current and changing business circumstances and interests whilst maintaining a watch and brief on existing product and service applications in the changing markets and variable stakeholder interests. Research and development business activities include:

a)   Maintaining a register of research activities and interests,
b)   Management of the observation schedule and program,
c)   Needs exploring, identification, and evaluations,
d)   Problem and opportunity identification and recognition,
e)   Best solution scenario with an assessment of options and alternatives,
f)   Stakeholder preferences identification and analysis,
g)   Potential market identification and analysis
h)   Filtering needs and solution priorities
i)   Detailing development specifications

The research activity is required to translate an identified problem into a statement of needs and contain sufficient detail for the development of business activities to commence. The information available must be screened and evaluated for development by the assigned research and development authority before committing to a specification for development. The process and product from a research project must be a subject covered in the documented business practice and the development specification is recognized as a controlled business record.

8.3.2 Development Business Activities

The Company must establish, implement and maintain a high-level design development business activity which is the progression from research work, but specifically tasked with technical evaluation and assessment of options and solutions in response to the needs identified by research business activities. Development business activities are accountable for all prescriptions and projects handed over from research or referred for development from other assigned authorities. The input to development having been screened must be assessed and confirmed as suitable for development work to commence. The input information required must consist of the following:

a)   Scope, title, and a brief description of development requirements,
b)   Rational and identified needs,
c)   Financial and commercial constraints or considerations,
d)   Technical Specification
e)   Project program and time scales,

The development process and sequence consist of:

f)   Receiving and evaluating prescriptions and projects allocated to development,
g)   Assessment and review of the information provided,
h)   Request for, or instigating inquiry into, additional information needed to commence development work,
i)   Compiling and authorizing the development brief and specification,
j)   Consideration and evaluation of options available for addressing the identified needs.
k)   Discounting those options which fail to match the needs identified,
l)   Selection and development of the options remaining,
m)   Transcribing the favored options into a comparator statement,
n)   Selection of the option best suited to the needs analysis,
o)   Preparing a development of the selected option into a design and selection specification,
p)   Briefing and handover to design and selection personnel of development work.

The development includes the producibility and testability of each option in the evaluation of each solution that is suitable, designable, producible, and measurable to address the needs the researchers have identified.

Consideration must also be given to the attributes, advantages, and disadvantages of each option identified as a suitable solution. The development seeks to balance general requirements with specific requirements in this evaluation.

This shall require validating the concepts chosen through screening against the defined needs Criterion and include the following considerations:

q)   Intellectual property considerations,   (Such as parents, infringements, jurisdiction, or sovereignty)
r)   Statutory and legislative requirements   (Local, domicile, and global)
s)   Reimbursement   (Sources of funding and recovery of development costs)
t)   Business Models   (Solution characteristics in each available model)
u)   Prototyping   (Identify the Questions or Issues to be Addressed)

Particular attention must be given to information gathered through prototyping, which could affect the overall feasibility of a concept. The additional information gathered through the considerations listed above (as well as other steps in the development process) must be directed toward the detailed user and design requirement specification for the solution selected.

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2.0   The EFQM Model Direction.

Criterion 2: 2.3 Enable Creativity & Innovation (BMS75k 8.3, 8.3.1, 8.3.2, 8.3.3, 8.3.4, 8.3.5, 8.3.6, 8.3.7, 8.3.8, 8.3.9,)

8.3.3 Research and Development Planning.

When appropriate, BMS75k Standard prescribes the Strategic Business Plan should contain a description and provision for the Company to gain knowledge to design, develop, and enhance its business activities including its products, services, technologies, and processes. This provision is recognized as the authority to devise and conduct individual research or development projects as business activities. All prospective research and development business activities shall be registered and authorized for which a plan and prescription shall be determined and recognized as a controlled business record consisting of:

Part 1   Research and Development Authorization
Part 2   Research and Development Project Plan
Part 3   Commercialization Strategy

8.3.3.1 Research and Development Authorisation

The authorization section of the Research and Development Plan consists of:
a)   Project Reference Numbers and Unique Identity
b)   Title and description of the project
c)   Principle consideration or concern
d)   Identification of the relevant subjects in the Strategic Business Plan.
e)   Relationship with the strategic business goals and objectives
f)   Provision for authorized signatures and approval date

8.3.3.2   Research and Development Project Plan

The project plan section of the Research and Development Plan consists of:
a)   Itemized list of project activities and objectives for each listed item
b)   Time scales and milestones program
c)   Provision for mark-up and sign-off by participating and verifying authorities
d)   Resource requirements and Key collaborators
e)   Team and Experience Requirements
f)   Costs and estimates

In addition to the above consideration must be given, to documenting additional information within the project plan section. This can include:
g)   Expected outcome(s).
h)   Roles and responsibilities of the team members involved.
i)   Time required for each activity.
j)   Practices or methods to be employed.
k)   Technological uncertainties and risk mitigation strategies for each task.
l)   Regulatory approvals
m)   Intellectual Property (e.g., copyrights, trademarks, patents, industrial design rights, trade secrets)

8.3.3.3 Commercialization Strategy

Each research and development project must contain a detailed and practical commercialization strategy, comprising a defined plan on how the resulting product, process, or service must be introduced to the marketplace and how revenue must be generated. This must include how the commercial outcome of the project must be promoted, distributed, and sold. The commercialization strategy must include:

a)   The need for this product, process, or service.
b)   Size of the market and the targeted niche within the market.
c)   Known competitors and competing products, processes, or services.
d)   Major challenges for market penetration.
e)   Team and collaborators' commercialization expertise and know-how.
f)   Independent market assessments if available.
g)   The value proposition that resulting products must deliver to the end customer.
h)   How the resulting products must achieve a competitive advantage in the marketplace.

When applicable a detailed breakdown of anticipated sales and market projections by product and customer must be included in the plan.

8.3.4 Research and Development Projects

Projects for research and development must be registered and authorized for which a plan and prescription are determined and approved. Projects include the research and evaluation of innovative and new developments, replacements for current goods and services, and the planned development of new goods and services required to realize sales and marketing objectives. The type of project can be identified from one of four recognized classifications:

a) Pure Business Research   consists of experiments and speculative business work authorized for acquiring new knowledge without long-term benefits focused principally on acquiring business knowledge or know-how.

b) Strategic Business Research   directed into specified areas to explore useful discoveries and provide a broad base of knowledge necessary for developing a solution to recognized practical problems.

c) Applied Business Research   for a specific application to determine uses for the findings of basic research or to determine new ways of achieving some specific and predetermined objectives.

d) Experimental Business   to extend knowledge gained from research or business experience to create new business activities or
Development   improved goods and practices.

The Company must determine research and development documented practice to define the levels and scope of authorization required for each of the above research and development project categories.

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**BMQS Standard Appendix A Correlation and Cross Reference with the
European Foundation for Quality Management 2020 (EFQM:2020)**

2.0   The EFQM Model Direction.

   Criterion 2: 2.3 Enable Creativity & Innovation (BMS75k 8.3, 8.3.1, 8.3.2, 8.3.3, 8.3.4, 8.3.5, 8.3.6, 8.3.7, 8.3.8, 8.3.9,)

8.3.5 Research and Development Inputs

Inputs to the Business Research Activity must be documented with sufficient detail needed to convey the tasks required by the strategic orientation of the Company. Research inputs required to enquire into current and changing business circumstances and interests must be defined and reviewed for adequacy by the issuing and receiving assigned authorities.

Research inputs relating to existing goods and service applications must be configured to the product and service current documentation and be sufficient in detail and subject for a problem to be understood, identified, actionable and productive. It must be sufficient in detail for an accepted research project to commence and result in a statement of needs.

The product of each research program and activity must be the development specification which is required to translate an identified problem into a statement of needs and contain sufficient detail for development business activities to commence. This Development Specification must be screened and evaluated by the assigned authority before committing to development work and is recognized as a controlled business record.

8.3.6 Research and Development Outputs

Business research and development business activity output consists of a completed research and development plan and prescription. The following information must include or refer to as a product or result of the development of business activities:

a)   Research and development project review records
b)   Scope, range, and results of the research and development work completed to date
c)   Commercialization Strategy/ Rational/Market Requirements
d)   Other important financial data and considerations that need to be communicated

When applicable, a design and selection prescription shall be provided by the development business activity consisting of the detailed specification for the design and selection business activity to undertake. This prescription contains as a minimum:

e)   Scope and description of design and selection work requirements and disciplines
f)   Known Statutory and Legislative Considerations
g)   Experience from similar development projects
h)   Pass Fail Criterion (Test and Inspection Expected Results)
i)   Metrics for test and inspection equipment and resources
j)   Requirements for any special processes
k)   Baseline configurations relative to existing products
l)   Outline and references for master records index
m) Nominations for manufacturing solutions
n)   Identification of specialist skills and techniques
o)   Make or buy considerations
p)   Requirements for high-level assemblies' hierarchy
q)   Critical component details and nominations
r)   Preservation and packaging considerations
s)   Requirements for user documentation and manuals
t)   Design and selection program and time scales
u)   Other design and selection considerations

The above documents must provide for verification that the products and services produced must meet the research and development statement of needs and other documented requirements.

The design and selection prescription must contain a list of critical aspects of the development that if changed, would invalidate the test results and necessitate a re-test. This must consist of a record of key characteristics, and specific actions to be taken to consistently produce the same aspect of the product and service and be recognized as a controlled business record.

   Note: *Design disciplines can consist of a dedicated design function such as IT, Electrical, Mechanical, Cosmetic, Fabric, and similar vocations or collectively such as Production, Logistic, Process, Publicity, or Distribution.*

8.3.7 Research and Development Results and Records

All records produced by the research and development business activities and projects must be determined and recognized as a controlled business record. As a minimum, these must consist of:

a)   Register of research activities and interests
b)   Development specification
c)   Research and development project plan
d)   Research and development project review records
e)   Design and selection of prescriptions
f)   Research and development assessment record

Each of the above records must be identified and traceable to an authority responsible for its review and approval for subsequent use and retention as a business record.

All such documents must be identified and controlled by the company's documented configuration control practices.

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8.3.8 Research and Development Assessment

The Company must establish, implement, and maintain a documented practice for the assessment of its research and development activities and projects to measure the effectiveness of the business activities and their contribution to the Strategic Business Plan. Research and development assessments can be incorporated into the assessment of goods and services or a separate analysis and review of the research and development business activity itself.

The review and analysis must use available data for the goods and services it produces or provides as well as research and development records derived from individual projects. Research and development assessments can be used to manage the goods and services and decisions needed during each phase of a life cycle. The aspects and applications of the goods and services must be assessed, analyzed, and reviewed as part of the research and development program and assessed at planned intervals to improve the goods and services' success during each of the phases of their life cycle.

(Development -Introduction – Growth – Maturity – Decline).

As part of each assessment or review, the Company must demonstrate through documented knowledge of the goods and services provided:

   a) An understanding of how the goods or service works within known applications,
   b) The resources, including know-how, needed for the continued production or delivery of the goods or service
   c) The resources and arrangements needed for the in-service support of the goods and services
   d) Obligations and commitments for suitable arrangements to provide for the replacement of obsolete items.
   e) The legal and statutory requirements applicable to the production, sale, and use.
   f) Protection and provision for recourse against counterfeit goods and services.

In addition, the research and development assessment review must consider all identified or foreseeable product or process risks and their consequences, including as appropriate to the Company and the business activities:

   g) Assignment of responsibilities for research and development management
   h) Characteristics and attributes of the current product range
   i) Assessment, conveyance, and communication of research and development concerns to managers and staff
   j) Management of actions required to realize the directives from research and development business activities
   k) Accommodations for new products and processes in the technology and orientation of the Company.

The assessment of research and development must be recorded as a controlled business record.

8.3.9 Research and Development Accountability

Accountability for research and development activities, results, and information produced must be traceable to an assigned authority. The Company must ensure that all decisions reached, and all research and development conclusions used are traceable to the assigned authorities tasked with the decisions made and the information used to make such decisions so that the decisions made are always defendable.

Measures must be applied in a documented practice to ensure decisions reached and acted upon within the business activities of the Company are always defendable and traceable to information and the occasion in which the decision was formed and can be proven to be sound and correct at a later stage.

All decisions reached because of information provided or used in a research and development business activity must be recorded and recognized as a controlled business record.

2.0   The EFQM Model Direction.

Criterion 2: 2.4 Unite Behind & Engage in Purpose, Vision & Strategy.   (BMS75k 0.4, 4.1, 4.2, 4.3, 4.4, 4.5,5.1, 5.2, 5.3, 5.4, 5.5)

The European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition requires a Company to enthuse, motivate and stimulate interest and support by uniting behind its purpose, vision, and strategy. The problem here is that stakeholders have different and often conflicting priorities, so motivating universal commitment and support for its purpose, vision, and strategy is asking a lot of any management system.

Fortunately, the BMS75000:2020 Business Management Standard within the following clause references provides for solutions to what seems to be an impossible requirement to address and manage effectively:

Support for Company Purpose and Vision:

0.4	**Commitment and inclusion of other management systems**
4.1	**Understanding the Company and its Relations**
4.2	**Understanding the Needs and Expectations of Interested Parties**
4.3	**Business Management System Scope**
4.4	**Business Management System**
4.5	**External Business Considerations**
5.1	**Commitment**
5.1.1	**Teamwork and Engagement**
5.1.2	**Management Commitment**
5.1.3	**Succession Policy and Plan**
5.2	**Business Management Policy**
5.3	**Company Roles, Responsibilities, and Authorities**
5.3.1	**Responsibility and Authority**
5.3.2	**Business Management Representative**
5.4	**Documented Business Management System**
5.4.1	**Business Management Manual**
5.4.2	**Business Management Practices**
5.4.3	**Departments and Practices**
5.5	**Cultural Issues and Conventions**
5.5.1	**Cultural Issues**
5.5.2	**National and International Conventions**

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2.0   **The EFQM Model Direction.**
          Criterion 2: 2.4 Unite Behind & Engage in Purpose, Vision & Strategy.   (BMS75k 0.4, 4.1, 4.2, 4.3, 4.4, 4.5,5.1, 5.2, 5.3, 5.4, 5.5)

Enlisting Support for Company Purpose
The BMS75000:2020 Business Management Standard recognizes under **Clause 0.4,** that a Company must be formed to fulfill a specific purpose in society and that purpose drives everything a Company does. The survival and continuity of a Company must depend greatly on its purpose which needs to be accepted by the society in which it operates. BMS75k accepts that business performance is not just assessed against economic performance or profit, but its conduct and contribution to matters of environment and welfare are equally important to its stakeholder. Companies of any type must be aware and concerned with their ecological and social performance in addition to financial welfare. In all companies, economics must be a restraint on what is done and what its managers can do, it cannot, therefore, be its sole objective.

The BMS75000:2020 Business Management Standard under **Section 4** takes on the problem of encouraging and developing support for its purpose which is achieved by setting and understanding the scope of its operations and the boundaries in which it does business. BMS75k requires a Company to identify and register external and internal authorities and matters that relate to its activities or influence its ability to achieve the planned objectives of its Business Management System. **Clause 4.1** referred to under C**lause 4.3** discusses the requirement when setting the planned objectives of its Business Management System.

Under **Clause 4.2** of the BMS75k Standard, the Company is directed to understand the needs and expectations of interested parties and requires to determine:

         a)   Parties considered having interests in the Business Management System,
         b)   Relevance and extent of the interest these parties are credited with,
         c)   Ability, competence, and capacity available and required to achieve the requirements of identified parties.

Stakeholders are recognized by EFQM:2020 as those who have an interest in the Company ecosystem. It requires a Company to balance these interests and evaluate its performance concerning its most important stakeholders, its "Key Stakeholders". Identifying Key Stakeholders is only one aspect of what the BMS75k Standard requires which goes much further and Clause 4.2b specifies not only the identification of the stakeholders but also their relevance and extent of the interest these parties are credited with. Without such information, addressing the needs and expectations of stakeholders in the decision-making activity would not be adequately informed.

BMS75k Clause 4.3 sets about establishing a definition of its purpose and requires the Company to consider the Business Management System limitations and extent of its applications to determine its scope. This must include National and International boundaries imposed by external authorities and stakeholders when setting and managing the scope of the Business Management System. The Business Management System scope is recorded, documented, and published so it is available to all stakeholders and all other known interested parties in a legible and accessible fashion.

BMS75k Clause 4.4 sets about establishing the communication and documentation of its purpose and requires the Company to create, effectively apply, operate, and continually develop its Business Management System. This must be achieved by planned improvements in its activities and practices used whilst considering their interactions, by the prescription of the Business Management Standard.

BMS75k Clause 4.5 introduces External Business Considerations in its Business Management System. The Company is directed to identify the domestic local, national, and international constraints and boundaries by which its activities are contained, and those within which its activities require permits, permission, duties, or consent, to operate within or beyond.

The domestic boundaries in which the business activities can operate without consideration beyond the indigenous statutory and legislative instruments must be defined, recorded, and reviewed at planned intervals.

Where the business activities or intentions transcend the defined domestic boundaries of the business, the required permits, permission, duties, or consents, to operate and manage the business activities in such areas and locations, must be determined registered, obtained, and complied with.

The Company must demonstrate consideration has been given to its activity and intentions concerning the following as it relates to its local domestic, national, and international obligations and impositions:

         a)   Culture and convention expectations and compliance,
         b)   Statutory and legislative requirements and stipulations,
         c)   Government and religious expectations and compliance,
         d)   Alignment of business risk and challenges with the strategic plan,
         e)   Conduct and integrity of business activity in global operations.

The Company must identify the relevance and degree to which its activity and intentions are affected by local, national, and international business considerations and prepare within its strategic plan for the known and foreseeable business opportunities and consequences.

The consideration and preparations must be assessed, developed, and reviewed at planned intervals as part of the Business Program, for suitability and relevancy, to take account and prepare action to accommodate the known current stipulations and proposed changes in the local, national and international business considerations.

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Enlisting Support for Company Vision

The EFQM:2020 requires the Company to develop a Strategy that describes how it intends to fulfill its purpose and host the plans through which to achieve the strategic priorities and move closer to its Vision. This "Vision" describes what the Company seeks to achieve and be seen to be achieved in the long term. It is intended to act as a guide for decision-making by which to select future courses of action. As such the vision and stated purpose become the basis for setting the Business Strategy of the Company.

A solution for defining a vision and commending a business strategy can be found in **Section 5** which contains **Clause 5.1** (Commitment) and **Clause 5.2** (Business Management Policy) in the BMS75000:2020 Business Management Standard which calls upon Executive Management to demonstrate Governance and Commitment. Under **Clause 5.1** the Company Executive Management must demonstrate its governance by example, commitment, and respect for stakeholder expectations and the requirements of the Business Management System. This is achieved by

a.   Confirming the Business Management Policy and Objectives are assured and understood in line with the Company's Strategic Policy and intentions,
b.   Confirming the Business Management System requirements are integrated with Company Business Practices,
c.   Providing the Business Management System resources needed for the effectiveness of the,
d.   Promoting within the Company, the importance of an effective Business Management System,
e.   Presiding over the managements conformance with Business Management System and its requirements,
f.   Ensuring business practices and the results achieve the agreed required objectives and outcomes,
g.   Supporting those who are tasked with developing the effectiveness of the Business Management System,
h.   Advocating continuous and permanent business activity improvements,
i.   Assisting management at all levels, with the governance and stewardship of their areas of responsibility,
j.   Communicating the importance of business activities that are core to the purposes of the Company's existence.

Clause 5.1.1 in BMS75k covers requirements for Teamwork and Engagement and requires Executive Management to promote and enhance management and employee contributions to the Business Management System and Strategic Business Plan by promoting teamwork and employee engagement in the planned objectives and effective implementation of the documented practices. Teamwork within all activities of a given department or function shall also be encouraged between divisions and departments within the Company.

Constructive competition between departments shall be encouraged by the use of agreed achievable targets and objectives with published results, to promote teamwork and provide for effective communications.

Clause 5.1.2 in BMS75k covers Management Commitment and requires Executive Management to provide evidence of its commitment to the development and implementation of the Business Management System with support and resources for the continual improvement of the system and communicating to all employees the importance of identifying and meeting stakeholder requirements and expectations as well as complying with statutory and regulatory requirements. Employees and management must be empowered, within defined limitations, to undertake and complete the tasks they are assigned in keeping with their known delegated authority and capabilities.

Clause 5.1.3 in BMS75k covers requirements for a Succession Policy and Plan by requiring the Company to recognize and address the need for a succession policy and plan as a controlled business record. This must include as a minimum requirement, the provision for the replacement of each assigned administrative authority and other key personnel who are core to the Business Management System and contributors to the Strategic Business Plan

Clause 5.2 in BMS75k covers the need for a Business Management Policy in which Executive Management must create and publish a policy that:

a)   Is in keeping and aligned with the Company's purpose,
b)   Contains a mandate for establishing and measuring Business Management Objectives,
c)   Contains an acknowledgment of responsibility for the recognized Business Management requirements
d)   Contains the obligation to continually improve the effectiveness of the Business Management System,

The Business Management policy must also be:

e)   Documented, controlled, and accessible
f)   In a language and format that is understood by all stakeholders,
g)   Reviewed at planned intervals for continuing suitability,
h)   Retained in a format that can be communicated to all other interested parties as appropriate
i)   Responsive to the needs and aspirations of those affected by the business activities of the Company

The Business Management Policy document must be a controlled business record.

Clause 5.3 in BMS75k discusses Company Roles, Responsibilities, and Authorities and requires Executive Management to display governance and identify with the principal activities of the Company by ensuring that appropriate responsibility and authority are assigned to competent executives supported by trained and competent staff. Executive Management must also provide evidence of its governance and commitment to the development and implementation of the Business Management System by continually improving its effectiveness. This includes:

a)   Communicating to the Company the importance of meeting stakeholders as well as statutory and regulatory requirements,
b)   Establishing and reviewing the Business Management Policy,
c)   Ensuring that Business Management objectives are established, measured, and reviewed at planned intervals,
d)   Conducting and attending Business Management Reviews, and
e)   Ensuring the availability of Business Management Systems, documented practices, and resources.

The commitment of Executive Management and the administrators of the Company must be assessed at planned intervals against the requirements of the Business Management Standard by independent authorities. The results of the assessment must be published and made available to appropriate stakeholders and authorities as a controlled business record.

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2.0   The EFQM Model Direction.

Criterion 2: 2.4 Unite Behind & Engage in Purpose, Vision & Strategy.   (BMS75k 0.4, 4.1, 4.2, 4.3, 4.4, 4.5,5.1, 5.2, 5.3, 5.4, 5.5)

Clause 5.3.1 in BMS75k discusses Responsibility and Authority for which Executive Management must delegate and assign responsibility and authority to competent executives and trained managers who are sufficiently empowered to:

a)   Ensure that the Business Management System conforms to the requirements of this Business Management Standard,
b)   Report effectively and accurately on the performance of the Business Management System to Executive Management and stakeholders,
c)   Ensure the conduct and practices of Business Management within the Company, are always accountable, correct, and defendable.

Clause 5.3.2 in BMS75k discusses the need to appoint and recognize the responsibility of a Business Management Representative and requires Executive Management to provide for a non-executive officer to fulfill the position of a Senior Management Representative operating at a senior level in the Company and recognized as a steward of the Business Management System. The Senior Management Representative's non-executive officer's duties shall include:

a)   Confirming that activities and business practices needed for the Business Management System are determined, operated, and consistent in use and application throughout the Company,
b)   Consulting with the Executive Management on matters of Business Management System performance and the need for change,
c)   Confirming the identification and promotion of best practices in Business Management throughout the Company.
d)   The freedom and unrestricted access to Executive Management, Stakeholders, and Records, to resolve Business Management issues.

> *NOTE: Business Management representative must be recognized as the answering and communicating authority to external parties and authorities on all matters relating to the Business Management System, the Business Ethics, and the Conduct of the Company and its Management.*

Clause 5.4 of BMS75k recognizes the need for a Documented Business Management System and requires the Company to determine, record, operate, and continue a Business Management System and develop the effectiveness of its operations and activities by complying with the Business Management Standards specified requirements. The documentation derived from the Business Management System must be recognized to comply with customer and applicable statutory and regulatory requirements in the policies, processes, and documented practices. The Company must anticipate, assess, accommodate, analyze, and account for the operation of the Business Management System by:

a)   Deciding on the most suitable practices needed for the system's correct and effective operation,
b)   Decide on the most suitable sequence or separation of these practices,
c)   Decide on the most suitable metrics to report on and control,
d)   Select the most appropriate measurements to report and use,
e)   Decide on what resources and know-how are needed for the operation and effectiveness of the system,
f)   Ensure such resources and know-how are available when the system requires them,
g)   Analyzing and accounting for the product of the Business Management processes, and
h)   Deciding when actions must be taken to achieve planned results and improve the practices.

These Business Management practices are used and deployed by the specified requirements of this Business Management Standard.
Principle Business Management System documentation includes:

q)   Strategic Business Plan **(See 6.2.2**)
r)   Sub-layer Business Plans that support and communicate the Strategic Business Plan **(See 6.2.2)**
s)   Commitment and declaration of a Business Management Policy **(See 5.2)**
t)   Commitment and specification of Business Management Objectives, **(See 6.2.1)**
u)   Documented Business Management Policy Manual, **(See 5.4.1).**
v)   Defined practices and records specified in this Business Management Standard **(See 5.4.2)**
w)   Defined and authorized Business Plans and Programs **(See 6.2.2)**
x)   Defined instructions or practices, records, or information needed by the Company to ensure the effective planning, operation, and control of its Business Management processes and systems **(See 5.4.2),**

The Company must ensure that personnel and stakeholders have access to, and are aware of, all relevant Business Management System documentation and details of all completed or intended changes.

> *NOTE 1   Within this Business Management Standard there is a clear directive for "documented practices" When a clause includes these words, then practice must be documented or an equivalent method, for the subject the clause defines. (See Clause 5.4.)*

> *NOTE 2   Business Management System documentation can be defined and structured to reflect the operation and the orientation of the business activity and markets. This structure must accommodate the Company size and the type of business activities performed, together with the intellectual property, know-how, experience, and known ability of employees and management.*

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Clause 5.4.1 of BMS75k specifies the requirement to develop and maintain a Business Management Manual and requires the Company to create and comply with a Business Management Manual that includes:

   a)   Boundaries of the Business Management System,
   b)   Explanations for not adopting a specified provision of the standard
   c)   Reference or a listing of the documented and defined practices established for the Business Management System,
   d)   A description of the integration or separation between the processes of the Business Management System.

Only when the Business Management System cannot accommodate or include a specified requirement of this Business Management Standard, a statement of exclusion can be included in the Business Management Manual immediately following a definition of the management systems scope.

For such exclusions to be permissible, due to the nature of the business activities, the Company's orientation, technology, process, or property, a valid and acceptable statement justifying the exclusion can be recorded.

These must be limited to subjects within Clause 8 of the standard and the decision documented and recorded as a controlled business record.

Clause 5.4.2 of BMS75k requires Business Management Practices to be documented and controlled. All subjects that are core activities and significant to the business activities or the continued operation of the Company must be documented in written form, or an equivalent method, and controlled following the provisions of this Business Management Standard.

Each business process contained or referred to in the Business Management Manual must be the subject of or included in, a documented practice which must be documented or an equivalent method, to establish and communicate administrative, specific, and operational or instructive requirements.

They must also be required for providing a common point of reference for activities and decisions that are similar or identical practices being undertaken by two or more resources, managers, departments, or assessors at similar times, events, activities, or circumstances.

   Note: *Equivalents to documenting a business practice can include electronic media such as computer programs, spreadsheets, database screens, flow charts, slide presentations, videos, and recordings provided they can adequately convey to the persons tasked with compliance what they are required to use, the process to be followed and what needs to be produced or completed.*

Where appropriate and relative to the Company, documented practices must consist of and include:

   a)   Administrative practices are documented and communicated to convey the business and departmental processes where the sequence of activities is significant and are recognized as being principal activities within the Company.

   b)   Specific practices documented and communicated to address a specified requirement for a documented practice within this Business Management Standard or where the Company considered a subject would benefit from being communicated in a documented practice.

   c)   Task Instructions are used to give specific instructions for individual tasks and duties, required to be undertaken consistently by more than one person, department, area, or branch of the Company.

   d)   Work Instructions to detail requirements for individual items of work needed for the effective operation and control of business processes, product realization, and services supplied or undertaken by the Company.

   e)   Documented guides are used to convey or record advice and instruction to support the operation, training, and management practices derived from previous experience or know-how.

A register of Business Management practices must be maintained together with the details of changes and revisions for each documented practice registered. This register and its contents are to be recognized as a controlled business record.

Clause 5.4.3 of BMS75k introduces the need for Departments and Practices to be documented. The management and departmental structure of the Company must be detailed in the Business Management Manual in a written or diagrammatical statement.

This must show the departmental structures of the Company and the reporting conventions employed towards its Executive Management. Each identified department can be the subject of a Documented Administrative Practice which must contain, but not be limited to:

   a)   Department Title and Responsibilities,
   b)   Inputs to the department and their source,
   c)   List of practices, tasks, and duties performed,
   d)   Reference to documented specified practices for which it is responsible,
   e)   Details of department outputs and their intended recipient, and
   f)   Metrics and objectives by which the effectiveness of the department can be determined.

The department practices, metrics, and objectives must be recorded following the Company culture and contribution to the Strategic Business Plan. These shall be recognized as controlled business records

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Clause 5.5 of BMS75k addresses the subject of **Cultural Issues and Conventions** which is a matter to consider in providing a solution to the requirements of the European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition, which requires a Company to stimulate interest and support by uniting behind its purpose, vision, and strategy.

As stated previously, the problem here is that stakeholders can have different and often conflicting priorities depending on which conventions they consider to be a priority and the Company Culture they expect to be accommodated.

The intentions of the Company in respect of current and future developments in its business operations are covered in the strategic business plan and address cooperation with, and prevention of, infringement of all relative and appropriate national and international cultural issues and conventions with which the Company is required or expected to comply with accommodate, respect, or contribute towards. A register of relative national and international cultural issues and conventions must be maintained as a controlled business record. The register must be maintained, reviewed, and updated as an item in the Business Program.

Clause 5.5.1 of BMS75k develops the subject of the requirements for Cultural Issues and requires the Company to develop and have a policy, for all relative and appropriate cultural issues and a strategy to consider their impact on the business operations and activities of the Company to accommodate differences in the collective intellectual achievements encountered through its business operations.

The cultural issues policy and strategy shall communicate the Company standard and expectations on relative and appropriate cultural issues which vary across the organization, its activities, operations, markets, and decisions, or when the Company activities encounter, infringe, and transcend boundaries and domains.

The standards for culture established at the pinacol of the Company's business operations must be recognized as the Company Cultural Standard so that those cultural issues which differ from what the Company promotes as relative and appropriate, can be recognized and accommodated within the policy and strategy including the differences in ideas, customs, and social behavior of a particular people, group or society which are affected by, or on which an impact is made by the activities of the Company.

The Company's response to those relative and appropriate cultural issues which border with the Company standard must be determined, documented, and communicated to the greatest practical extent, by way of example or specification, to ensure there is a conveyance and consistency of the required understanding of what is relative and appropriate at each level in the organization where the boundaries of the culture meet, or converge with the Company operations or business activities.

Wherever possible, the Company must respect and abide by the relative and appropriate cultural requirements which apply within the domicile of the contracting authority with whom the Company is engaged, and respect and abide by the conventions applied within the boundaries and domains of the contracting authority.

When this is not possible, due to statutory or legislative impositions, or because of intransient external issues, or cultural differences beyond the Company's control, the Company can appoint a qualified agent or intermediary who is well versed in the relative and appropriate cultural issue in question and is acceptable to the cultural authorities and has a clear understanding of all relative and appropriate cultural issue and is expedient in the culture, boundaries, limitations, and merits.

Clause 5.5.2 of BMS75k addresses the requirements in respect of National and International Conventions and requires the Company to identify and comply with all relative and appropriate National and International conventions which it is required to, or has elected to, recognize and comply with or support, due to statutory and legislative instruments or strategic choice and policy. Compliance consists of:

a)   Identifying which conventions apply and are relative to the Company and its business interests and activities.
b)   Confirming that the business and management objectives relate to and subscribe to the conventions
c)   Assuring that the company's strategic policy and intentions do not conflict with the conventions.
d)   Confirming the conventions and their prescription is incorporated into the Company's business practices.
e)   Providing the resources essential for compliance with the convention.
f)   Ensuring the resources allocated are effective for complying with the conventions.
g)   Promoting the Business Management System can accommodate the conventions identified.
h)   Presiding over the management of conformance with all relative and appropriate convention requirements.
i)   Ensuring business practices and results achieve the prescribed outcome of the convention.
j)   Supporting those who are tasked with assuring convention conformance.
k)   Advocating permanent and progressive compliance with the expectations of the convention improvements,
l)   Assisting management in the governance and stewardship of areas of responsibility for every identified appropriate convention.
m)   Communicating the requirements and expectations of the conventions identified that are core to the obligations of the Company.

The register of national and international cultural issues and conventions must contain a listing of those conventions to which the Company maintains compliance or subscribes, as a matter of strategic policy. This policy of conventions compliance must be published and be available to all registered stakeholders and those with a valid interest in the Company and its intentions. Organizations and professional associations, which play an essential role in assisting the Company to identify the selection of appropriate and relative conventions must also be used to provide validation and qualification.

> **Note 1**   *A Contracting authority is a person, group, organization, state, regional or local council, an administrative body governed by public law, associations formed by one or several of such authorities, or one or several of such bodies governed by public law, but for the Business Management Standard must normally be a customer, supplier, contractor, client, creditor, debtor or investor in the Company.*

> **Note 2**   *Cultural issues can prohibit or permit, class distinction, sect and racial discrimination, sex discrimination, religious intolerance, segregation of race, prohibited political persuasion, intolerance of sexual orientation, and historical interpretation of events.*

> **Note 3**   *In identifying conventions relative to the Company's business activities and interests, the company may be directed by the United Nations Register of Treaties and Conventions when dealing or considering new trading relationships with a previously unknown country or domicile.*

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BMQS Standard Appendix A Correlation and Cross Reference with the
European Foundation for Quality Management 2020 (EFQM:2020)

2.0   The EFQM Model Execution

Having established the direction for an outstanding organization, under **2.0 Direction**. the European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition continues under **2.0 Execution** by specifying its requirements for Execution of the Purpose, Vision, and Strategy by sighting 3 Criterion:

Criterion 3.   Engaging Stakeholders
Criterion 4.   Creating Sustainable Value
Criterion 5.   Driving Performance & Transformation

Criterion 3. Engaging Stakeholders

3.1	**Customers:**	Build Sustainable Relationships
3.2	**People:**	Attract, Engage, Develop & Retain
3.3	**Business & Governing Stakeholders** –	Secure & Sustain Ongoing Support
3.4	**Society:**	Contribute to Development, Well-Being & Prosperity
3.5	**Partners & Suppliers:**	Build Relationships & Ensure Support for Creating Sustainable

Criterion 4 Creating Sustainable Value

4.1	**Design the Value & How it is Created**
4.2	**Communicate & Sell the Value**
4.3	**Deliver the Value**
4.4	**Define & Implement the Overall Experience**

Criterion 5 Driving Performance & Transformation

5.1	**Drive Performance & Manage Risk**
5.2	**Transform the Organization for the Future**
5.3	**Drive Innovation & Utilize Technology**
5.4	**Leverage Data, Information & Knowledge**
5.5	**Manage Assets & Resources**

The European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition requires any prospective outstanding Company to identify with and achieve outstanding results that meet its Stakeholders' expectations. As a minimum, it would be necessary to:

a.   Define an inspiring Purpose.
b.   Create an aspirational Vision.
c.   Develop a Strategy that is centered on Creating Sustainable Value.
d.   Build a Winning Culture.

By setting a Company Direction for the way forward a Company needs to effectively execute its Strategy, by ensuring that the Company:

e.   Know who the stakeholders are in its ecosystem and engage fully with those that are Key to its success.
f.   Creates Sustainable Value.
g.   Drives the levels of performance necessary for success today and,
h.   Drives the necessary improvement and transformation.

Both BMS75k and EFQM:2020 recognize the need when assessing and scoring how an organization executes its Strategy for Engaging Stakeholders, there must be flexibility in assessing and scoring performance.

The European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition requires the Execution of a developed Strategy by:

i.   Identifying the specific types and categories within each of its Key Stakeholder Groups.
j.   Use the understanding of Key Stakeholders' needs and expectations to achieve continued engagement.
k.   Involve Key Stakeholders in deploying its Strategy and Creating Sustainable Value and recognize the contributions they make.
l.   Builds, maintain, and develop a relationship with Key Stakeholders based on transparency, accountability, ethical behavior, and trust.
m.   Work with its Key Stakeholders to develop a common understanding and focus on how, through co-development, it can contribute to, and draw inspiration from, the United Nations Sustainable Development Goals and Global Compact ambitions.
n.   Actively gather the perceptions of its Key Stakeholders rather than waiting for them to make contact.
o.   Evaluates its performance concerning Key Stakeholder's needs and decide on the appropriate actions to be taken to help secure its future, as perceived by these Key Stakeholders

In practice, an outstanding organization must include the following groups in the classification of its Key Stakeholders:

2.0   The EFQM Model Execution. Criterion 3

3.1	**Customers:**	Build Sustainable Relationships
3.2	**People:**	Attract, Engage, Develop & Retain
3.3	**Business & Governing Stakeholders:**	Secure & Sustain Ongoing Support
3.4	**Society:**	Contribute to Development, Well-Being & Prosperity
3.5	**Partners & Suppliers:**	Build Relationships & Ensure Support for Creating Sustainable Value

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BMQS Standard Appendix A Correlation and Cross Reference with the European Foundation for Quality Management 2020 (EFQM:2020)

2.0   The EFQM Model Execution.

Criterion 3 Engaging Stakeholders (BMS75k 4.0, 4.1, 4.2, 4.2.1, 4.2.2, 4.2.3, 4.2.4,)

The European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition requires a prospective outstanding organization to:

- a)   Identify the specific types and categories within each of its Key Stakeholder Groups.
- b)   Use the understanding of Key Stakeholder's needs and expectations to achieve continued engagement.
- c)   Involve Key Stakeholders in deploying Strategy and Creating Sustainable Value and recognize the contributions they make.
- d)   Build, maintain and further develop the relationship with Key Stakeholders based on transparency, accountability, ethical behavior, and trust.
- e)   Work with its Key Stakeholders to develop a common understanding and focus on how, through co-development, it can contribute to, and draw inspiration from, the United Nations Sustainable Development Goals and Global Compact ambitions.

A Company is also required to actively gather the perceptions of its Key Stakeholders rather than waiting for them to make contact and evaluate performance concerning Key Stakeholders' needs and decide on the appropriate action to take to help secure a permanent future, as perceived by the Key Stakeholders.

By looking to the directive of the European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition, in determining who are the Key Stakeholders we must consider the application of both EFQM:2020 and BMS75k to identify the required response in respect of the following:

3.1	**Customers:**	Build Sustainable Relationships
3.2	**People:**	Attract, Engage, Develop & Retain
3.3	**Business & Governing Stakeholders:**	Secure & Sustain Ongoing Support
3.4	**Society:**	Contribute to Development, Well-Being & Prosperity
3.5	**Partners & Suppliers:**	Build Relationships & Ensure Support for Creating Sustainable Value

The Business Management Standard BMS75000:2020 provides a solution in **Section 4.0** which covers the "**Context of the Business**" and **Clause 4.1** which covers "**Understanding the Company and its Relations**" with solutions to these requirements residing mainly in **Clause 4.2** which covers the requirements for an "Understanding of the Needs and Expectations of Interested Parties and consists of:

- **4.2.1**   General Needs and Expectations of Interested Parties.
- **4.2.2**   Legal and Regulatory Requirements.
- **4.2.3**   Identification of Business Stakeholders.
- **4.2.4**   Customer Responsibility and Focus.

Criterion 3: Engaging Stakeholders

3.1 Build Sustainable Relationships with Customers (BMS75k 4.0, 4.1, 4.2, 4.2.1, 4.2.2, 4.2.3, 4.2.4,)

The European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition requires a prospective outstanding organization to form a sustainable relationship with its customers. This entails identifying specific types and categories of the customer to develop a usable understanding of key customer needs and expectations to secure continued sustainable engagement.

The Company must consider key customers' requirements and expectations when deploying its Strategy to create sustainable value and recognize the contributions each stakeholder makes. The company must also need to build, maintain, and further develop the relationship with key customers based on:

- a)   Transparency,
- b)   Accountability,
- c)   Ethical behavior and
- d)   Trust.

The company must develop a common understanding and focus on how, through co-development, it can contribute to, and draw inspiration from, the United Nations Sustainable Development Goals and Global Compact Ambitions.

The company must be proactive in actively gathering information on the perceptions of key customers and not wait for them to make contact.
Finally, the company must evaluate its performance concerning its key customers' needs and decide on the appropriate actions to be taken to help secure its future, as perceived by the prime customers.

Solutions can be found in the BMS75000:2020 Business Management Standard within the following clause references which collectively provide for good awareness and stewardship of key customers' needs and expectations:

4.0	**Context of the Business**
4.1	**Understanding the Company and its Relations**
4.2	**Understanding the Needs and Expectations of Interested Parties**
4.2.1	**General**
4.2.2	**Legal and Regulatory Requirements**
4.2.3	**Identification of Business Stakeholders**
4.2.4	**Customer Responsibility and Focus**

Additional support and direction is available for Engaging Stakeholders and Building Sustainable Customer Relationship from

4.5	**External Business Considerations**
6.1.6	**Goods and Service Planning Analysis and Reviews**
8.1.3	**Customer Services and Support**
8.2	**Customer-Related Business Activities**
8.2.1	**Determination of Requirements**
8.2.2	**Review of Requirements**
8.2.3	**Review of Requirement Applications and Use**
8.2.4	**Customer Use Lifecycle Support and Provision.**
8.2.5	**Customer Communication**
8.6.5	**Customer Property**
9.1.4	**Customer Satisfaction and Perception Evaluation**

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**BMQS Standard Appendix A Correlation and Cross Reference with the
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2.0   The EFQM Model Execution.

Criterion 3 Engaging Stakeholders

3.1 Build Sustainable Relationships with Customers (BMS75k 4.0, 4.1, 4.2, 4.2.1, 4.2.2, 4.2.3, 4.2.4, 4.5, 6.1.6, 8.1.3, 8.2, 8.2.1, 8.2.2, 8.2.3, 8.2.4, 8.2.5, 9.1.4)
The relevance of **Clause 4.0-4.2.4** covers the Context of the Business, Understanding the Company and its Relations, and Understanding the Needs and Expectations of Interested Parties. This solution has already been discussed in connection with a solution for EFQM Criterion 1.3 in connection with developing an understanding of the Ecosystem, its Capabilities & Major Challenges. Additional solutions can be found in the BMS75000:2020 Business Management Standard for Engaging Stakeholders, and in particular, customers in the following sections and clauses:

Clause 4.2.4 of the BMS75000:2020 Business Management Standard addresses the need to consider Customer Responsibility and Focus as part of its ecosystem. BMS75k requires the customer to be classified as a Key Stakeholder and the Company is required to recognize customers as such to ensure that customer requirements are determined and met consistently, to enhance customer satisfaction with the business activities, goods, and services the Company produces, distributes, provides, deploys or is otherwise responsible for. Executive Management is required to ensure that suitable measurements are taken at planned intervals to assess the perception customers have of the quality of the business activities, including the quality of the goods and services produced and the operation and processes the Company employs from a customer perspective.

The BMS75000:2020 Business Management Standard requires the Company to consult customers at planned intervals and retain a business record of customer perception. Suitable and relevant objectives and measurements must be used to monitor customers' satisfaction and perception of the business activities. Appropriate action must be taken if planned results are not achieved or must not be achieved within the timescales set.

Clause 4.5 of BMS75k addresses the requirements for External Business Considerations of which customers form a major consideration.
The Company is required to identify the domestic local, national, and international constraints and boundaries by which its activities are contained, and those within which its activities require permits, permission, duties, or consent, to operate within or beyond.

The domestic boundaries in which the business activities can operate without consideration beyond the indigenous statutory and legislative instruments need to be defined, recorded, and reviewed at planned intervals.

Where a customer's requirements transcend the defined domestic boundaries of the business, the required permits, permission, duties, or consents, to operate and manage the business activities in such areas and locations, must be determined registered, obtained, and complied with.

A Company must demonstrate consideration has been given to its customer-related activity and intentions concerning a list of matters detailed within **Clause 4.5** and including conduct and integrity of business activity in global operations.

The Company must identify the relevance and degree to which its activity and intentions are affected by local, national, and international business considerations and prepare a strategic plan for the known and foreseeable business opportunities and consequences.

The consideration and preparations must be assessed, developed, and reviewed at planned intervals as part of the Business Program, for suitability and relevancy, to take account and prepare action to accommodate the customer's known current stipulations and any proposed changes in the local, national and international business considerations.

Clause 6.1.6 of BMS75k addresses the requirements for Goods and Service Planning Analysis and Reviews to which customers' requirements and expectations are a prime consideration. In this respect, a Company must plan, review and analyze available data for the goods and services it produces or provides. Goods and service planning can be used to manage the goods and services and decisions needed during each phase of a life cycle which includes:

a)   The introduction and withdrawal of goods or service
b)   Risks associated with the goods or service
c)   Goods or service ownership, configuration, and responsibility
d)   Goods and service costing, sales, revenue, profits, forecasting, and development
e)   Understanding the customers' needs and use relating to the goods or service
f)   Goods and service development and improvement to exceed customers' expectations
g)   Suitability, integrity, and traceability of programs, materials, components, processes, and services used
h)   Selection and partnering of suppliers and their contributions to the goods or service
i)   Producibility, inspectability, and Criterion for correctness and completion of the goods and service
j)   Ownership of goods or services intellectual property, patents, and licenses
k)   Goods and service reliability, availability, and maintainability
l)   Goods and service integrity, precautions against counterfeit goods, and safety in use
m)   Goods and service compliance with specified standards, known expectations, and statutory instruments
n)   Obligations in respect of migration, retirement, obsolescence, and replacement
o)   Recycling or final disposal of the goods and services at the end of their life.
p)   Directions to and contributions from other internal operations and activities within the Company

These aspects and applications of the goods and services must be assessed, analyzed, and reviewed at planned intervals to improve the goods and service success during each of the phases of their life cycle (development -introduction – growth – maturity – decline). As part of each assessment or review, the Company must be able to demonstrate through documented knowledge of the goods and services provided:

q)   An understanding of how the goods or service works within its known applications,
r)   The resources, including know-how, needed for the continued production or delivery of the goods or service
s)   The resources and arrangements needed for the in-service support of the goods and services
t)   Obligations and commitments for suitable arrangements to provide for the replacement of obsolete items.
u)   The legal and statutory requirements applicable to the production, sale, and use.
v)   Protection and provision for recourse against counterfeit goods and services.

The analysis and review of goods and service planning must be recorded as a controlled business record and the practices for goods and service planning analysis and reviews must be the subject of a documented practice or an equivalent method.

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BMQS Standard Appendix A Correlation and Cross Reference with the European Foundation for Quality Management 2020 (EFQM:2020)

2.0   The EFQM Model Execution.
Criterion 3 Engaging Stakeholders Continued
3.1 Build Sustainable Relationships with Customers (BMS75k 4.0, 4.1, 4.2, 4.2.1, 4.2.2, 4.2.3, 4.2.4, 4.5, 6.1.6, 8.1.3, 8.2, 8.2.1, 8.2.2, 8.2.3, 8.2.4, 8.2.5, 9.1.4)

Clause 8.1.3 of BMS75k addresses the requirements for Customer Services and Support and for the Sales and Customer Services assigned authority to produce the sales prediction and analysis details for the Strategic Plan based on the market analysis.

This can be contained in a dedicated section of the strategic plan or referenced as a separate Sales Analysis and Forecast. The reporting and achievement of the Strategic Plans and sales objectives must be reviewed at planned intervals by the Business Management Representative. The review Criterion, scope, frequency, and methods must be defined in a documented practice and reflected in the Business Program.

Clause 8.2 of BMS75k addresses the prime consideration of the Customer Related Business Activities which is conveyed in 5 sub-clauses

      8.2.1   Determination of Requirements
      8.2.2   Review of Requirements
      8.2.3   Review of Requirement Applications and Use
      8.2.4   Customer Use Lifecycle Support and Provision.
      8.2.5   Customer Communication

Clause 8.2.1 of BMS75k addresses the Determination of Requirements and directs the company to The Company shall record and account for all customer-related business activities including:

    a)   The customers' specified requirements, terms, and conditions of purchase or sale which can include goods and service delivery, business conduct, and after-sales activities,
    b)   Known requirements omitted by the customer but known to be applicable and important by the Company,
    c)   Business activities, goods or services, statutory and regulatory requirements that are known to be relative,
    d)   Any known requirements for the protection of the customer or interests of other stakeholders.

    Note 1:   *Requirements relative to the customer-related business activities normally relate to the supply of goods or services but these can also include special requirements of a customer known to the Company that is derived or determined by the special circumstances, conditions, or known application to which the business activity, goods or service is intended to be used or applied.*

    Note 2:   *After-sales and service requirements include the provisions of guarantees, bonds, undertakings, and obligations. These shall include, but not be limited to, environmental responsibilities or final clearance after use, conservation services and in-service support such as obsolescence provision, and retention of records, goods replacement, business continuity, and provision for the investigation and reporting particularly in the event of a non-detected or benign failure.*

Clause 8.2.2 of BMS75k addresses the Review of Customers Requirements and requires the Company to evaluate and record as a controlled business record all customer requirements related to each business activity, identifying the product or service and the version being offered or provided. The review must be conducted before the start of each customer-related business activity and ensure that:

    a)   Customer-related business activity requirements are known and understood,
    b)   The requirement is declined if it cannot be matched with a product or service that is compatible and suitable
    c)   Amended requirements which conflict with those previously agreed upon are resolved,
    d)   The Company shall be capable of fulfilling all known requirements.
    e)   Special requirements of each customer are determined and addressed
    f)   The risk associated with each business customer-related activity has been identified
    g)   There is a sufficient return to the Company on the investment to be made, or the the decision to proceed is recorded as considered defendable.

The customer-related business activity must not commence before the review of requirements has been completed and recorded. If the review identifies the need for clarification or changes in the requirement, the Company must ensure records are amended and the current known requirement is being applied or provided. All authorities involved must be informed and made aware of any changed requirements. A master record index must record the current customer-related business activity details and known requirements agreed upon with the customer. Business Records of the review must be recorded and retained as a controlled business record traceable to an authorized and competent authority.

Clause 8.2.3 of BMS75k addresses the Review of a Requirement Application and the Use
When a customer-related business activity is dependent on the advice and know-how of the Company *(e.g. for sizing or quantifying a requirement based on a statement of application or duty),* then the Company must be responsible for the advice, recommendation, or offer given and must ensure that the goods and services offered or provided as a result of the customer related business activity are capable of fulfilling the known requirements.

The Company must record a problem statement or provide a statement of requirement specifying what the customers-related business activity requirements are and be recognized as a controlled business record. To assist a customer in producing a statement of requirements, the Company must develop standards and checklists against which can be recorded the available details and data. The standards can be used for preparing the customers' contribution and problem statement against which to make recommendations and for which customer-related business activity can proceed on an informed and agreed basis.

Clause 8.2.4 of BMS75k addresses Customer Use, Lifecycle, Support, and Provision
Customer-related business activities which require the Company to supply goods or services must be supported by the Company for the duration of the known application. The Company must establish the Criterion for the expected period of use and the support required for the envisaged period on the goods and services provided. This support must be suitable Foundation enough for the intended use and period of use by known customers and end users.

The Company must identify the possibility of risks associated with goods and service obsolescence and plan for the eventuality as part of its risk management practice. There shall be an acknowledgment in the business activity of the obligation to customers which can be compromised by a decision to make goods or services obsolete, and this shall be anticipated from a risk perspective. Notification from marketing, design, or purchasing that goods or services are to be phased out or must cease to be available from a particular date, must be reviewed and all affected customers and authorities notified. Contractual obligations to which the Company is committed must also be reviewed and assessed upon notification, or the possibility of obsolescence becoming a concern.

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**BMQS Standard Appendix A Correlation and Cross Reference with the
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2.0   The EFQM Model Execution.
         Criterion 3 Engaging Stakeholders Continued
         3.1 Build Sustainable Relationships with Customers (BMS75k 4.0, 4.1, 4.2, 4.2.1, 4.2.2, 4.2.3, 4.2.4, 4.5, 6.1.6, 8.1.3, 8.2, 8.2.1, 8.2.2, 8.2.3, 8.2.4, 8.2.5, 9.1.4)

Clause 8.2.5 of BMS75k addresses Customer Communications and requires the Company to determine and provide within each customer-related business activity, effective arrangements for communicating with customers concerning goods or service information including inquiries, contracts, requirement changes, order handling, and customer feedback, as well as customer complaints. This shall be the subject of a documented business practice.

Complaints and feedback relating to a customer-related business activity must be reviewed and assessed for any contribution to business improvement including goods and service improvements. Complaints and feedback relating to the quality of the management or business conduct must be recorded and reviewed as a controlled business record for contribution to the Business Management System improvements and the Company's obligations to its customers and other stakeholders.

All customer communications in which a complaint, commendation, or statement of perception is identified must be recorded and recognized as a controlled business record.

Clause 8.6.5 of BMS75k is directed at the stewardship of Customer Property. In all cases where customer property is entrusted to the Company, an assigned authority is appointed to be responsible for the property. The authority must ensure it is monitored and controlled, identified as belonging to the customer in question, and only used for the agreed purposes for which it was supplied.

If any customer property is lost, damaged, or otherwise found to be unsuitable for use, the Company must report and record this to the customer. Any surplus items or obsolete data must be returned to the customer or disposed of in an agreed fashion acceptable to all concerned parties.

Customer property can include:

   a)   Materials or data supplied for inclusion in a process or goods,
   b)   Goods returned for correction or replacement
   c)   Goods or information supplied for samples, repair, or upgrading,
   d)   Packaging and materials or advice supplied directly by the customer for logistical purposes,
   e)   Customers gauges, tooling, computer programs, or aides
   f)   Materials and goods handled during inquiries, operations, relocations, or temporary storage,
   g)   Services supplied and funded by others about a customer's property whilst in the organization's charge,
   h)   Intellectual property including specifications, software, firmware, and test prescriptions.

Customer property can also include customer-furnished data used to assist the production and/or inspection of the goods and verifications of services provided. The Company shall be responsible and accountable for the protection and integrity of the customer's intellectual property.

In respect of the above, the Company must be a good steward of all customer property by determining and applying a documented practice for ensuring its identification and ownership are suitably recorded and identified. Due consideration must be given by the Company as to the customer's instructions for the use, care, and disposition or disposal whilst under the stewardship of the Company. In the absence of such instruction, standards of accommodation, and logistical reasonability must be applied where applicable or when known and be evident from the accommodation awarded to such property by the Company.

The Company shall use identification and traceability business activity practices to segregate customer property from its own and other customer's property. This shall be recorded and evident by providing for an account of its use and disposition from receipt, assignment through to consumption for the specified purpose.

Records must be maintained of all decisions relative to the management and identification of customer property. These are recognized as controlled business records.

Clause 9.1.4 of BMS75k instructs the company to assess and evaluate Customer Satisfaction and Perception. The performance of the Business Management System, in respect of an organization's obligation to its customers, must be monitored from the collection and analysis of information relating to customer perception as to whether the Company has met customer requirements. The methods for obtaining and using this information shall be determined following a documented practice. Information to be monitored and used for the evaluation of customer satisfaction can include, but is not limited to,

       a)   goods and service conformity,
       b)   on-time delivery performance,
       c)   customer complaints and
       d)   corrective action requests.

Organizations are directed to develop and implement plans for customer satisfaction improvement that address deficiencies identified by these evaluations and assess the effectiveness of the results.

Monitoring customer perception must include obtaining input from customers as well as analysis of existing indigenous data derived from the business activities of the organization.

Records must be produced and maintained of monitoring, measurement, analysis, and evaluation of customer satisfaction and perceptions which must be recognized as a controlled business record.

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2.0   The EFQM Model Execution.

Criterion 3 Engaging Stakeholders Continued (BMS75k 4.0, 4.1, 4.2, 4.2.1, 4.2.2, 4.2.3, 4.2.4, 4.5, 6.1.6, 8.1.3, 8.2, 8.2.1, 8.2.2, 8.2.3, 8.2.4, 8.2.5, 9.1.4)

The above solutions available for **Criterion 3.1 of the** European Foundation for Quality Management 2020 (EFQM:2020) directing us to Build Sustainable Relationships with Customers can equally be applied to all stakeholders however there is a specific solution available for the following:

Criterion 3 Engaging Stakeholders
3.2 People Attract, Engage, Develop & Retain.
(BMS75k 4.0, 4.1, 4.2, 4.2.1, 4.2.2, 4.2.3, 4.5, 5.1.1, 5.1.2, 5.3, 5.4.3, 6.1.2, 6.4.1, 7.1.2, 7.1.3, 7.1.4, 7.1.6, 7.4.1, 7.4.2, 8.8, 9.1.5)

3.2 People Attract, Engage, Develop & Retain

Here the European Foundation for Quality Management 2020 (EFQM:2020) directs us to Attract, Engage, Develop & Retain our people which mostly relates to employees, although there are others who this relates to that are under our control but not employed directly as such. Solutions can be found in the BMS75000:2020 Business Management Standard within the following clause references which collectively provide for good awareness and stewardship of people and key personnel needs and expectations:

5.1.1	Teamwork and Engagement
5.1.2	Management Commitment
5.3	Company Roles, Responsibilities, and Authorities
5.4.3	Departments and Practices
6.1.2	Make or Buy Analysis and Planning
6.4.1	Indigenous Change Preparation and Management
7.1.3	Premises Infrastructure and Working Environment
7.1.4	Occupational Health and Safety
7.1.6	Human Resources
7.4.1	Training and Instruction
8.8	External Business Operational Influences
9.1.5	Employee Perception Evaluation
9.3	Management Review

Clause 5.1.1 of BMS75k instructs us on the need for Teamwork and Engagement and requires Executive Management to promote and enhance management and employee contributions to the Business Management System and Strategic Business Plan by promoting teamwork and employee engagement in the planned objectives and effective implementation of the documented practices.

Teamwork within all activities of a given department or function must also be encouraged between divisions and departments within the Company. Constructive competition between departments is to be encouraged by the use of agreed achievable targets and objectives with published results, to promote teamwork and provide for effective communications.

Clause 5.1.2 of BMS75k instructs us on the need for Management Commitment with Executive Management directed to provide evidence of its commitment to the development and implementation of the Business Management System. Support and resource are required for the continual improvement of the system and for communicating to all employees the importance of identifying and meeting stakeholder requirements and expectations as well as complying with statutory and regulatory requirements.

Employees and management must be empowered, within defined limitations, to undertake and complete the tasks they are assigned in keeping with their known delegated authority and capabilities.

Clause 5.3 of BMS75k contains direction on Company Roles, Responsibilities, and Authorities and requires the Executive Management to display governance and identify with the principal activities of the Company by ensuring that appropriate responsibility and authority for the principal activities are assigned to competent executives supported by trained and competent staff. In addition, Executive Management must provide evidence of its governance and commitment to the development and implementation of the Business Management System by continually improving its effectiveness. This shall include:

a)   Communicating to the Company the importance of meeting stakeholder as well as statutory and regulatory requirements,
b)   Establishing and reviewing the Business Management Policy,
c)   Ensuring that Business Management objectives are established, measured, and reviewed at planned intervals,
d)   Conducting and attending Business Management Reviews, and
e)   Ensuring the availability of Business Management Systems, documented practices, and resources.

The commitment of Executive Management and the administrators of the Company must be assessed at planned intervals against the requirements of the Business Management Standard by independent authorities. The results of the assessment must be published and made available to appropriate stakeholders and authorities as a controlled business record.

Clause 5.4.3 of BMS75k discusses the need for Departments and Practices and a management and departmental structure of the Company. This must be detailed in the Business Management Manual in a written or diagrammatical statement showing the departmental structures of the Company and the reporting conventions employed towards its Executive Management. Where appropriate, each identified department must be the subject of a Documented Administrative Practice which must contain, but not be limited to:

a)   Department Title and Responsibilities,
b)   Inputs to the department and their source,
c)   List of practices, tasks, and duties performed,
d)   Reference to documented specified practices for which it is responsible,
e)   Details of department outputs and their intended recipient, and
f)   Metrics and objectives by which the effectiveness of the department can be determined.

The department practices, metrics, and objectives can be recorded by the Company culture and contribution to the Strategic Business Plan. These are recognized as controlled business records.

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BMQS Standard Appendix A Correlation and Cross Reference with the European Foundation for Quality Management 2020 (EFQM:2020)

2.0   The EFQM Model Execution.
    Criterion 3 Engaging Stakeholders Continued
    3.2 People Attract, Engage, Develop & Retain.
    (BMS75k 4.0, 4.1, 4.2, 4.2.1, 4.2.2, 4.2.3, 4.5, 5.1.1, 5.1.2, 5.3, 5.4.3, 6.1.2, 6.4.1, 7.1.2, 7.1.3, 7.1.4, 7.1.6, 7.4.1, 7.4.2, 8.8, 9.1.5)

Clause 6.1.2 of BMS75k discusses the need for the Make or Buy Analysis and Planning discussion to consider people's and employee's needs and expectations and demonstrate that in all principal activities, the costs, and benefits of using internally acquired resources have been planned by comparing the options to purchase or hire from suitable suppliers or sub-contractors. Make or buy considerations do have major implications for the workforce and include as appropriate

    a)   Associated risks and opportunities
    b)   Cost and value to the Company of each option
    c)   Timeliness and program
    d)   The totality of the problem solution and transfer of ownership
    e)   Relative goods, or service quality
    f)   Availability and sustainability of capacity
    g)   Loss of experience, know-how, goodwill, and other intellectual property.

The make-or-buy decision must be reviewed from the full perspective of available facilities and resources with due consideration to each option and its impact on:
    h)   Maximum utilization of facilities and resources.
    i)   Transfer or conversion of underemployed facilities and resources.
    j)   Maintenance, reduction, and disposition of facilities and resources.

The impact on our Company's stakeholders must be considered and, those persons or authorities that can affect, be affected by, or perceive themselves to be affected by the make or buy decision. The practices for make or buy business activities shall be the subject of a documented practice. The decision to make or buy must be recorded and the record recognized as a controlled business record.

Clause 6.4.1 of BMS75k discusses the need for Indigenous Change Preparation and Management and its implications for our people.
The management of change practice must specify the planned and continuous assessment and review of the Business Activity, with an evaluation of its Business Management System and related processes to determine compliance and correctness of the Business Management System with the Business Management Standard or if changes are required. These changes can include as appropriate:

    a)   Changes to Business Practices and Company Structure.
    b)   Changes in Policy and Responsibility.
    c)   Changes to Procedures or Documented Practices.
    d)   Changes derived from Audits, Checks, and Reviews.
    e)   Improvement Management Plans.

Indigenous change planning and preparation must be applied to matters over which the Company has the most control and influence. This includes:

    f)   Change in the scope of the Business Management System.
    g)   Policy changes or amendments.
    h)   Product and service change;
    i)   Process change;
    j)   Procedure change;
    k)   Change in Employee skills and know-how;
    l)   Change in Management style and structure;
    m)   Changes in capacity and output.

All indigenous changes to the Business Management System must be authorized at the appropriate level, evaluated as suitable and appropriate, and registered in a revision under the established and documented configuration control practices.

Clause 7.1.2 of BMS75k directs us to the Provision of Resources and requires the Company provides for the availability of resources identified within the Strategic Plan and those resources that have a direct impact on the correctness and timely completion of an approved and authorized business activity. The timely availability of resources must be recognized as a priority for the Business Plans as a contributor to the success of each business activity. These include:

    a)   Infrastructure
    b)   Human resources, workforce skills, and vocations
    c)   Capability, competence, and knowhow of the Human resources
    d)   Finance and cash-flow
    e)   Access to the Business Records
    f)   Working Environment and Social Welfare
    g)   Capital and Investment
    h)   Income and Expenditure

The Company must provide and maintain the facilities required to achieve and operate an effective Business Management System which includes:

    i)   Workspace and associated facilities
    j)   Human resource instruction and training
    k)   Plant, machines, equipment, tooling, hardware, and software;
    l)   Supporting management services.
    m)   Accurate and correct information
    n)   Intellectual property, Know-how, and experience
    o)   Provision and channels of communication
    p)   Means and methods by which to identify and report incorrectness
    q)   Records and methods by which product and service integrity can be confirmed
    r)   Empowerment at appropriate levels to correct deficiencies or errors

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European Foundation for Quality Management 2020 (EFQM:2020)

2.0   **The EFQM Model Execution.**
Criterion 3 Engaging Stakeholders Continued
3.2 People Attract, Engage, Develop & Retain.
(BMS75k 4.0, 4.1, 4.2, 4.2.1, 4.2.2, 4.2.3, 4.5, 5.1.1, 5.1.2, 5.3, 5.4.3, 6.1.2, 6.4.1, 7.1.2, 7.1.3, 7.1.4, 7.1.6, 7.4.1, 7.4.2, 8.8, 9.1.5)

Clause 7.1.3 of BMS75k introduces the subject of Premises Infrastructure and Working Environment and its relevance to the workforce and people under our control or in our consideration. In respect of the Company's operational environment, it must be recognized that the working environment, premises, and infrastructure all contribute to sound decision-making and excellence in operational performance. Factors that contribute to correctness and timeliness in business activity and conduct must be determined and controlled, which include cleanliness, security, and protection for employees, customers, and all other visitors.

Clause 7.1.4 of BMS75k addresses Occupational Health and Safety requiring the Company to install and operate in all areas and branches an Occupational Health and Safety program for employees to practice the control and mitigation of all foreseeable Occupational Health and Safety risks that are inherent in the Company's processes and practices. The program must consist of:

a)   Establish practices and practices to eliminate or minimize risks to personnel and other interested parties who could be exposed to hazards associated with the business activities.
b)   Implement, maintain, and continually improve the practices and practices established.
c)   Conformance to a published and understood Occupational Health and Safety policy.

The Company is required to conform to the Occupational Health and Safety provisions and practices established by:

d)   Making a self-determination and self-declaration,
e)   Seeking confirmation of conformance by stakeholders
f)   Seeking confirmation of its self-declaration by an external qualified authority

The extent of Occupational Health and Safety practices, and what practices are applied, must depend on the Company's business activities, the range, and diversity of its stakeholders, its technology, and the risks and complexity of its operations. For guidance on establishing and maintaining an Occupational Health and Safety system, please refer to ISO45000 the International Standard for Occupational Health and Safety Management Requirements.

Clause 7.1.6 of BMS75k addresses Human Resources and requires that the Company ensures that employees or any person under its control who are contributing to business activity, are competent in completing assigned tasks based on appropriate education, training, or experience. The Company must retain the education, training, and experience records of employees, or any person under its control, as a controlled business record.

The Company must identify employee needs associated with its Business Management System and provide advice, instruction, and training to be given to nominated employees in the subjects which the standard prescribes to each vocation and ability needed. The action taken must be defined and recorded to evaluate its effectiveness as a controlled business record and establish, implement, and maintain documented practices to make persons working under its control aware of:

a)   The consequences, actual or potential, of their work activities,
b)   Their contribution to business outcomes,
c)   Requirements for conduct and behavior,
d)   Benefits to be derived from training and improved personal performance.
e)   Their roles and responsibilities
f)   The importance of conforming with Company policy and practices and to the requirements of the Business Management System,
g)   The risks involved in not fulfilling the specified practices and requirements.

The documented practice must consider different levels of responsibility, ability, language, skills, literacy, and risks in which the person is engaged or to which they are to be assigned. Where appropriate, the authority responsible for human resources is required to produce the details needed for the human resource and welfare content of the Strategic Plan. This can be included in the Strategic Plan or contained in a separate Human Resource and Welfare Business Plan, which is referred to in the Strategic Plan.

The human resources assigned authority is responsible for the development and implementation of the documented practices which detail the reporting and achievement of the Strategic Plans personnel and human resource aspect and objectives. Following the Business Program, a Human Resource and Welfare Review is planned, undertaken, recorded, and reported as a controlled business record.

The achievement of the Strategic Plans for human resources and welfare aspects and objectives are reviewed at planned intervals by the Business Management Representative. The review criteria, scope, frequency, and methods are defined in the documented practice and reflected in the Business Program.

Clause 7.4.1 of BMS75k tackles the prime subject of Training and Instruction of personnel engaged or employed by the Company who are required to complete all tasks assigned, having received training or be suitably qualified and experienced in such tasks for which records must be available and traceable to the employees concerned.

Where competence, awareness, and communication are inadequate to ensure the provisions of a Business Plan are achieved, resources must be provided to prepare, inform and instruct those responsible or accountable for the tasks involved. The Company must determine the requirements of each Business Plan and provide training or take other actions to achieve its objectives. The company shall evaluate the effectiveness of the action taken and ensure that its personnel are aware of the relevance and importance of their activities and how they contribute to the achievement of the relevant Business Plans provisions

Appropriate records of education, training, skills, and experience must be maintained and traceable to the individuals concerned as a controlled business record. Under Clause 7.4.2 the company shall evaluate the effectiveness of the training provided and provide advice and instruction where appropriate from both internal and external sources. Training and advice provided must be recognized as a means by which corrective action can be provided and non-compliances can be sentenced.

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BMQS Standard Appendix A Correlation and Cross Reference with the European Foundation for Quality Management 2020 (EFQM:2020)

2.0   The EFQM Model Execution.
    Criterion 3 Engaging Stakeholders Continued
    3.2 People Attract, Engage, Develop & Retain.
    (BMS75k 4.0, 4.1, 4.2, 4.2.1, 4.2.2, 4.2.3, 4.5, 5.1.1, 5.1.2, 5.3, 5.4.3, 6.1.2, 6.4.1, 7.1.2, 7.1.3, 7.1.4, 7.1.6, 7.4.1, 7.4.2, 8.8, 9.1.5)

Clause 8.8 of BMS75k introduces instruction on the relevance of External Business Operational Influences to people, attract, engage, develop, and retain. In addition to controlling internal operational Business Activities, the Company must consider all known External Business Operational Influences that can impact or create a need for change in the planned current and consistent Business Activities which are matched to achieve the set objectives.

The Company must establish, implement, and maintain, in a documented practice, the activities required for determining and monitoring all identified or foreseeable external matters which advantage or detract from the planned business operations. The need for change or mitigation is considered for specific internal environment factors and attitudes which would directly affect the company's planned operations including:

   a)   Customer's requirement expectations, changes, and variations,
   b)   Suppliers' capacity variations and difficulties,
   c)   Employee requirements and expectations,
   d)   Competitor's activities and achievements,
   e)   Public preference, trends, and fashions,
   f)   Marketing techniques, campaigns, and promotions,
   g)   Media activities, intrusions, and adverse publicity,
   h)   Availability of information, experience, knowledge, skills, and advice,
   i)   Industrial action and disputes,
   j)   Surrounding infrastructure.

Consideration must be given to aggregate factors and influences that affect the Business Operation through the sector, area, or boundary in which the Company Business operates or is constrained, including, as appropriate:

   k)   National and International Statutory and Legislative Instruments
   l)   Political Domestic or Foreign Policy
   m) Religious Orientation and Activity,
   n)   Economic Developments or Recessions,
   o)   Technology,
   p)   Social and Natural Environmental Change.

External Business Operational Influence which includes factors outside the control of the company must be determined for their impact on current operational Business Activities. Each factor must be registered and assessed by recording:

   q)   Description, by which to identify the factor,
   r)   Information Origin used to monitor its activity and influence,
   s)   Subjects and activities susceptible to the factors influence,
   t)   The assigned authority responsible for monitoring and reporting
   u)   Characteristics of the factors identified,
   v)   Management of actions to be taken when the factor is encountered,

The subjects and origin of all known external Business Operational influences must be monitored for their current and preferred level of influence and evidence of potential change, so appropriate action can be anticipated, assessed, accommodated, analyzed, and accounted for. The monitoring consists of a review at planned intervals as part of the Business Program, used for detecting changes in external influence factors and the subject's suitability and relevancy to the people management activities.

Clause 9.1.5 of BMS75k introduces Employee Perception Evaluation which is a subject included for reporting to the Management Review Meetings.
The performance of the Business Management System, in respect of the organization's obligation to its employees, must be monitored from the collection and analysis of information relating to employee perception as to whether the Company is a good employer and offers secure competitive employment and opportunities that met employee expectations and requirements. The methods for obtaining and using this information are determined following a documented practice and include:

   a)   Assessment of prospective employee expectations and requirements at the point of engagement,
   b)   Annual reviews of employee performance, training, and improvements
   c)   Review of employee satisfaction/dissatisfaction with terms and conditions of employment at the point of termination or retirement.

Organizations can develop and implement plans for employee perception improvement that address deficiencies identified by these evaluations and assess the effectiveness of the results. Information to be monitored and used for the evaluation of employee perception include, but is not limited to,

   d)   Care and welfare
   e)   Knowledge and identity with the organization's business goals and objectives
   f)   Pride in the job and the product or service of the business activities
   g)   The remoteness of management and its understanding of employee concerns and issues at all levels
   h)   The ability for employees to communicate with management
   i)   The ease by which employees can assess themselves and their development in the organization
   j)   The need to correct poor performance, and bad behaviors
   k)   Motivation and incentive

Monitoring employee perception must include obtaining input from the employee as well as analysis of existing indigenous data derived from the business activities of the organization. Records are produced and maintained for monitoring, measurement, analysis, and evaluation of employee perception which are recognized as a controlled business record.

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2.0   The EFQM Model Execution.

Criterion 3 Engaging Stakeholders Continued

3.3 Business & Governing Stakeholders: Secure & Sustain Ongoing Support

(BMS75k 4.0, 4.1, 4.2.3, 4.3, 4.4, 4.5, 5.0, 5.1, 5.1.1, 5.1.2, 5.1.3, 5.2, 5.3, 5.3.1, 5.3.2, 5.4, 5.4.1, 5.4.2, 5.4.3, 5.5, 5.5.1, 5.5.2,)

Here the European Foundation for Quality Management 2020 (EFQM:2020) directs us to Secure & Sustain Ongoing Support from our Business & Governing Stakeholders which mostly relates to Senior Shareholders and the Company Executives, although there are other prime authorities to who this must relate that can also influence stakeholders.

In seeking solutions from BMS75000:2020 Business Management Standard to Secure & Sustain Ongoing Support from our Business & Governing Stakeholders we must also consider that the company must also provide resource and reward to empower the Business & Governing Stakeholders, but first, we must consider the company hierarchy, structures, and the assigned authority for which the following diagram can be of help:
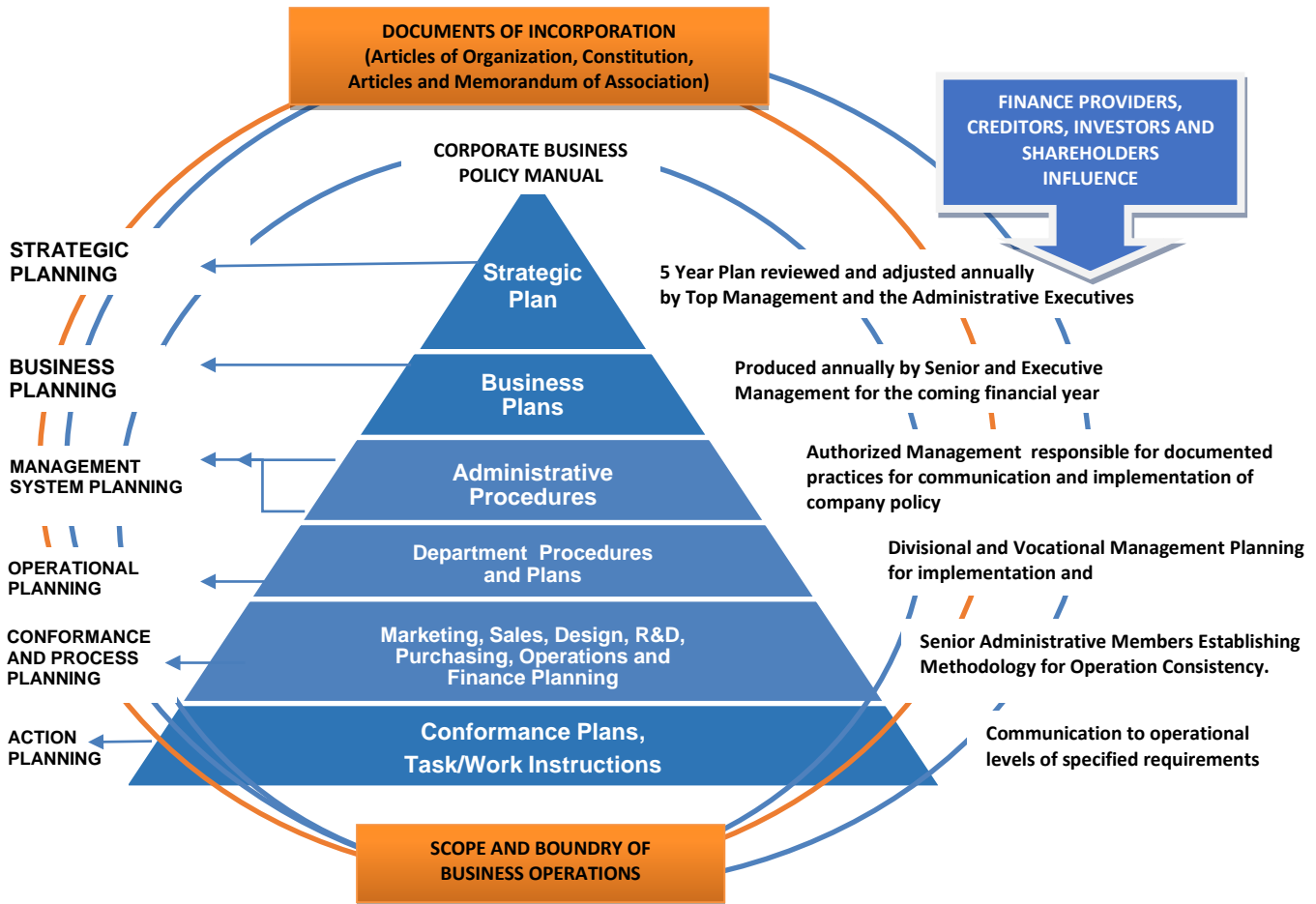
To Secure & Sustain Ongoing Support from our Business & Governing Stakeholders, we must view the administrative level to which these requirements apply and include some consideration for all authorities who influence forming policy content and member's compliance.

The EFQM 2020 identifies these as Key Stakeholders who play a major role in business, being prime decision-makers, they are responsible for the long-term future of an organization. The prime consideration here is the Administrative Executive Board and Principal Shareholders because the Executive Board are the strategic decision makers influenced by the Principal Shareholders and other know and active influential authorities.

Under Criterion 1 (1.2 Identify & Understand Stakeholders Needs) we have discussed the requirement for us to identify and register external and internal authorities and matters that relate to its activities or influence its ability to achieve planned objectives.

Under Clause 4.2 of the BMS75k Standard, we are directed to understand the needs and expectations of interested parties and determine:

a)   Parties considered having interests in the Business Management System,

b)   What relevance and extent of the interest these parties are credited with,

c)   What ability, competence, and capacity are available and required to achieve the requirements of identified parties.

Stakeholders are recognized by the European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition as those who have an interest in our ecosystem. It requires the Company to balance these interests and evaluate the performance of its most important stakeholders, its "Key Stakeholders". Identifying Key Stakeholders is only one aspect of what the BMS75k Standard requires which goes much further.

Clause 4.2b of BMS75k specifies not only the identification of the stakeholders but also their relevance and the extent of interest and influence these parties are credited with. Without the identification of these key stakeholders and such information, addressing their needs and expectations in the decision-making activity would not be adequately informed.

A Business Management Representative is required to register the known interest of the identified parties and retain the records produced as a controlled business record. The appointment of a Business Management Representative is the subject of **Clause 5.3.2 of BMS75k** and is normally a role given over to a Non-Executive Director.

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BMQS Standard Appendix A Correlation and Cross Reference with the
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2.0   The EFQM Model Execution.
          Criterion 3 Engaging Stakeholders
          3.3 Business & Governing Stakeholders: Secure & Sustain Ongoing Support Continued
          (BMS75k 4.0, 4.1, 4.2.3, 4.3, 4.4, 4.5, 5.0, 5.1, 5.1.1, 5.1.2, 5.1.3, 5.2, 5.3, 5.3.1, 5.3.2, 5.4, 5.4.1, 5.4.2, 5.4.3, 5.5, 5.5.1, 5.5.2,)

Solutions on the identification of **Business & Governing Stakeholders** and a quantified attempt to identify the interest or influence they have over a company, so we can **Secure & Sustain their Ongoing Support** can be found in the **BMS75000:2020 Business Management Standard** within the following clause references which collectively provides for good awareness and stewardship of governing and influential people and key personnel needs and expectations:

4.1	**Understanding the Company and its Relations**
4.2.3	**Identification of Business Stakeholders**
5.0/5.1	**Governance and Commitment**
5.1.2	**Management Commitment**
5.3	**Company Roles, Responsibilities, and Authorities**

In addition to the above prime directives in BMS75000:2020 Business Management Standard additional solutions can be taken from the following:

4.0	**Context of the Business**
4.2	**Understanding the Needs and Expectations of Interested Parties**
4.3	**Business Management System Scope**
4.4	**Business Management System**
4.5	**External Business Considerations**
5.1	**Commitment**
5.1.1	**Teamwork and Engagement**
5.1.3	**Succession Policy and Plan**
5.2	**Business Management Policy**
5.3.1	**Responsibility and Authority**
5.3.2	**Business Management Representative**
5.4	**Documented Business Management System**
5.4.1	**Business Management Manual**
5.4.2	**Business Management Practices**
5.4.3	**Departments and Practices**
5.5	**Cultural Issues and Conventions**
5.5.1	**Cultural Issues**
5.5.2	**National and International Conventions**

Clause 4.1 of BMS75k directs us in the identification of Business & Governing Stakeholders with a quantified attempt to identify the interest or influence they have in our activities, so we can Secure & Sustain their Ongoing Support. This is assisted by developing an understanding of the organization and its relations by identifying and registering external and internal authorities and matters that relate to its activities or influence its ability to achieve the planned objectives of its Business Management System.

Clause 4.2.3 of BMS75k instructs us on the Identification of Business Stakeholders and requires us to identify all individuals and authorities who are directly and indirectly affected by our business activities including national and international groups, parties, persons, or authorities that can affect, be affected by, or perceive themselves to be affected by a decision or activity.

Likewise, we must identify all direct and indirect local, national, and international authorities, that can have an effect, or be perceived to influence our business activities and objectives which would be accompanied by a decision or activity they have the authority to make or create.

We must maintain a suitable register of all persons and stakeholders who are notifiable correspondents in our activities or have an invested interest in the operation of its business activities and operations as a controlled business record.

Clause 5.0/5.1 of BMS75k introduces the subject of Governance and Commitment as a solution to Secure & Sustain the Ongoing Support of Business & Governing Stakeholders and requires Executive Management to demonstrate its governance by example, commitment, and respect for stakeholder expectations and the requirements of the Business Management System. This must be achieved by

a)   Confirming the Business Management Policy and Objectives are assured and understood in keeping with Company Strategic Policy intentions,
b)   Confirming the Business Management System requirements are integrated with Company Business Practices,
c)   Providing the Business Management System resources needed for the effectiveness of the,
d)   Promoting the importance of an effective Business Management System,
e)   Presiding over the managements conformance with Business Management System and its requirements,
f)   Ensuring business practices and the results achieve the agreed required objectives and outcomes,
g)   Supporting those who are tasked with developing the effectiveness of the Business Management System,
h)   Advocating continuous and permanent business activity improvements,
i)   Assisting management at all levels, with the governance and stewardship of their areas of responsibility,
j)   Communicating the importance of business activities that are core to the purposes of our existence.

This is supported by Clause 5.1.2 which introduces Management Commitment as a contributor to Secure & Sustained Ongoing Support of Business & Governing Stakeholders

This requires Executive Management to provide evidence of its commitment to the development and implementation of the Business Management System with support and resources for the continual improvement of the system and communicating to all employees the importance of identifying and meeting stakeholder requirements and expectations as well as complying with statutory and regulatory requirements.

Employees and management must be empowered, within defined limitations, to undertake and complete the tasks they are assigned in keeping with their known delegated authority and capabilities.

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2.0   The EFQM Model Execution.
Criterion 3 Engaging Stakeholders
3.3 Business & Governing Stakeholders: Secure & Sustain Ongoing Support Continued
(BMS75k 4.0, 4.1, 4.2.3, 4.3, 4.4, 4.5, 5.0, 5.1, 5.1.1, 5.1.2, 5.1.3, 5.2, 5.3, 5.3.1, 5.3.2, 5.4, 5.4.1, 5.4.2, 5.4.3, 5.5, 5.5.1, 5.5.2, 6.0, 9.0, 10.0,)

Clause 5.3 of BMS75k addresses the subject of Company Roles, Responsibilities, and Authorities. The solution for Secure & Sustained Ongoing Support of Business & Governing Stakeholders. Executive Management must display governance and identify with the principal activities by ensuring that appropriate responsibility and authority for the principal activities are assigned to competent executives supported by trained and competent staff.

Executive Management must provide evidence of its governance and commitment to the development and implementation of the Business Management System by continually improving its effectiveness. This shall include:

    a)   Communicating the importance of meeting stakeholder as well as statutory and regulatory requirements,
    b)   Establishing and reviewing the Business Management Policy,
    c)   Ensuring that Business Management objectives are established, measured, and reviewed at planned intervals,
    d)   Conducting and attending Business Management Reviews, and
    e)   Ensuring the availability of Business Management Systems, documented practices, and resources.

The commitment of Executive Management and the administrators must be assessed at planned intervals against the requirements of the Business Management Standard by independent authorities. The results of the assessment must be published and made available to appropriate stakeholders and authorities as a controlled business record.

In respect of Responsibility and Authority, the Executive Management delegate and assign responsibility and authority to competent executives and trained managers who are sufficiently empowered to:

    f)   Ensure that the Business Management System conforms to the requirements of this Business Management Standard,
    g)   Report effectively and accurately on the performance of the Business Management System to Executive Management and stakeholders,
    h)   Ensure the conduct and practices of Business Management, are accountable, correct, and always defendable.

Executive Management must provide for a non-executive officer to fulfill the position of a Senior Management Representative operating at a senior level and recognized as a steward of the Business Management System. The Senior Management Representative non-executive officer's duties include:

    i)   Confirming that activities and business practices needed for the Business Management System are determined, operated, and consistent in use and application,
    j)   Consulting with the Executive Management on matters of Business Management System performance and the need for change,
    k)   Confirming the identification and promotion of best practices in Business Management throughout our operations.
    l)   The freedom and unrestricted access to Executive Management, Stakeholders, and Records, to resolve Business Management issues.

    NOTE: Business Management representative must be recognized as the answering and communicating authority to external parties and authorities on all matters relating to the Business Management System, the Business Ethics, and the Conduct of Management.

The above solutions occupy themselves with what is required of our Business & Governing Stakeholders to Secure & Sustain their Ongoing Support for Business Activities. As stated previously, in seeking solutions from BMS75000:2020 Business Management Standard to Secure & Sustain Ongoing Support from our Business & Governing Stakeholders we must also consider providing resource and reward to empower the Business & Governing Stakeholders.

Here solutions are available from BMS75000:2020 Business Management Standard in forming policy and plannings to secure and sustain ongoing support for our Business & Governing Stakeholders:

    4.0   Context of the Business
    5.0   Governance and Commitment
    6.0   Business Planning
    7.0   Support and Resources
    9.0   Business Performance Evaluation
    10.0   Business Improvement

These are discussed as solutions in detail under the EFQM Section 6 covering the Business and Governing Stakeholder Perception.

2.0   The EFQM Model Execution.
Criterion 3 Engaging Stakeholders Continued
3.4 Society: Contribute to Development, Well-Being & Prosperity
(BMS75k Cl 0.4, 1.3, 4.0, 4.1, 4.2, 4.5, 5.0, 5.1, 5.2, 5.3, 5.5, 5.5.1, 5.5.2, 6.0, 6.1.1, 6.4.2, 6.4.3, 7.6, 8.3, 8.4, 8.7, 8.8,)

Here the European Foundation for Quality Management 2020 (EFQM:2020) directs the Company to contribute to the development, well-being, and prosperity of society and identifies society as a category within its Key Stakeholder Groups. The Company is further required to use its understanding of society's needs and expectations to achieve continued engagement and involve representatives of the society in which its work in deploying the Business Strategy and Creating Sustainable Value by recognizing the contribution society as a whole can make.

The Company must build, maintain and further develop the relationship within the society based on transparency, accountability, ethical behavior, and trust by working to create a common understanding and focus on how, through co-development, it can contribute to, and draw inspiration from, the United Nations Sustainable Development Goals and Global Compact ambitions.

In this connection, we must actively gather details of the perceptions of society on the Company and its activities. We are expected to evaluate the Company's social performance and take appropriate action to secure its future within the society we operate and occupy.

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2.0   The EFQM Model Execution.

Criterion 3 Engaging Stakeholders

3.4 Society: Contribute to Development, Well-Being & Prosperity Continued

(BMS75k Cl 0.4, 1.3, 4.0, 4.1, 4.2, 4.5, 5.0, 5.1, 5.2, 5.3, 5.5, 5.5.1, 5.5.2, 6.0, 6.1.1, 6.4.2, 6.4.3, 7.6, 8.3, 8.4, 8.7, 8.8,)

Solutions on the identification of society stakeholders and a quantified attempt to identify the interest or influence society and its institutions have in the Company activities and operations. These solutions can be found in the **BMS75000:2020 Business Management Standard** clauses and sections presented so we can **Contribute to the Development, Well-Being & Prosperity** within the society in which the Company operates and the place it occupies:

0.4	**Commitment and inclusion of other management systems**
1.3	**Conventions**
4.0	**Context of the Business**
4.1	**Understanding the Company and its Relations**
4.2	**Understanding the Needs and Expectations of Interested Parties**
4.5	**External Business Considerations**
5.0	**Governance and Commitment**
5.2	**Business Management Policy**
5.3	**Company Roles, Responsibilities, and Authorities**
5.5	**Cultural Issues and Conventions**
5.5.1	**Cultural Issues**
5.5.2	**National and International Conventions**

To contribute to the development of the society in which the company operates and occupies, its planning and objectives must be aligned with the interests of 2nd and 3rd parties who are affected by or perceive themselves to be affected by, the business operations and activities. In this respect, solutions can be found in the following

6.0	**Business Planning**
6.1.1	**Risk Identification and Management**
6.4.2	**External Change Preparation and Management,**
6.4.3	**Planning and Accommodating Unforeseen Issues,**
7.6	**Resource and Support for External Influences**
8.3	**Research and Development Business Activities**
8.4	**Design and Selection Business Activities**
8.7	**Control of Non-conforming Products and Services**
8.8	**External Business Operational Influences**

The European Foundation for Quality Management 2020 (EFQM:2020) requires the Company to build, maintain and further develop the relationship within society. This must be based on transparency, accountability, and ethical business behavior to create a common understanding and focus on how, through co-development, we can draw inspiration from its obligations and contribution.

We are directed to actively gather details of the perceptions of society on our Company and its activities and evaluate its social performance to take appropriate action when our social accountability is found to need repair or redirection.

Solutions can be found in the application of Sections 9 and 10 of the **BMS75000:2020 Business Management Standard** which contains the following subjects:

9.0	**Business Performance Evaluation**
9.1	**Monitoring, Measurement, Analysis, and Evaluation**
9.1.1	**Monitoring and Measurement of Processes**
9.1.2	**Monitoring and Measurement of Goods and Services**
9.1.3	**Shareholder Perception Evaluation**
9.1.4	**Customer Satisfaction and Perception Evaluation**
9.1.5	**Employee Perception Evaluation**
9.1.6	**Supplier Perception Evaluation**
9.1.7	**Stakeholders' Perception, Expectations, and Satisfaction**
9.3	**Management Review**
9.4	**Management of Unforeseeable Events**
10.0	**Business Improvement**
10,1	**Opportunities for Improvement**
10.2	**Nonconformity and Corrective Action**
10.2.1	**Non-conformance Identification and Containment**
10.2.2	**Root Cause Analysis**
10.2.3	**Corrective Action**
10.2.4	**Preventive Measures**
10.3	**Continual Improvement.**

The **BMS75000:2020 Business Management Standard** under **Clause 0.4** addresses, as an introduction a commitment and inclusion of other management systems and recognize that a Company must be formed to fulfill a specific purpose in society and that purpose drives everything a Company does.

The survival and continuity of a Company must depend greatly on its purpose which needs to be accepted by the society in which it operates. Business performance is not just assessed against economic performance or profit, but its conduct and contribution to matters of environment and welfare are equally important to its stakeholder.

Companies of any type must be aware and concerned with their ecological and social performance in addition to financial welfare. In all companies, economics must be a restraint on what is done and what its managers can do, it cannot, therefore, be its sole objective.

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2.0   **The EFQM Model Execution.**
Criterion 3 Engaging Stakeholders (BMS75k Cl 0.4, 1.3, 4.0, 4.1, 4.2, 4.5, 5.0, 5.1, 5.2, 5.3, 5.5, 5.5.1, 5.5.2, 6.0, 6.1.1, 6.4.2, 6.4.3, 7.6, 8.3, 8.4, 8.7, 8.8,)
3.4 Society: Contribute to Development, Well-Being & Prosperity Continued

The European Foundation for Quality Management 2020 (EFQM:2020) makes specific reference in this connection to the United Nations Sustainable Development Goals and Global Compact ambitions. These are:

> **GOAL 1:**   **No Poverty**
> **GOAL 2:**   **Zero Hunger**
> **GOAL 3:**   **Good Health and Well-being**
> **GOAL 4:**   **Quality Education**
> **GOAL 5:**   **Gender Equality**
> **GOAL 6:**   **Clean Water and Sanitation**
> **GOAL 7:**   **Affordable and Clean Energy**
> **GOAL 8:**   **Decent Work and Economic Growth**
> **GOAL 9:**   **Industry, Innovation, and Infrastructure**
> **GOAL 10: Reduced Inequality**
> **GOAL 11: Sustainable Cities and Communities**
> **GOAL 12: Responsible Consumption and Production**
> **GOAL 13: Climate Action**
> **GOAL 14: Life Below Water**
> **GOAL 15: Life on Land**
> **GOAL 16: Peace and Justice Strong Institutions**
> **GOAL 17: Partnerships to achieve the Goal**

Clause 1.3 of BMS75k discusses the subject and consideration of conventions by introducing the convention of the 5As because within any given market, organization or industry, there are conventions that promote a given understanding within the given sector of operation. BMS75k standard promotes the convention of the 5As as displayed in the following diagram when considering or evaluating national and international conditions or changes:

Anticipate:	**The identification of risks, opportunities, trends, and life cycle stages.**
Assess:	**The determination of a quantified and measurable aspect or attribute.**
Accommodate:	**The hosting or processing resources needed to accept**
Analyze	**The measurement of the product of the Business Activities**
Account:	**The recording and stewardship of the work done.**

The use of the 5As in connection with Contributing to Development, Well-Being & Prosperity of our society is well commended in particular the prompt to anticipate the outcome of a given business activity.

Clause 4.0, 4.1, and 4.2.1 of BMS75k address the Context of the Business and requires a Company to identify and register external and internal authorities and matters that relate to its activities or influence its ability to achieve the planned objectives of its Business Management System. The Business Management Representative is required to register the known interest of the identified parties within the society in which we operate and occupy, and retain the records produced as a controlled business record. This provides a good foundation for the EFQM requirement on the identification of society stakeholders.

Clause 4.5 of BM|S75k addresses the requirement to identify and quantify external business considerations which the European Foundation for Quality Management 2020 (EFQM:2020) directs us to do under Criterion 3.4 and identify society as a category within our Key Stakeholder Groups. The Company must identify the domestic local, national, and international constraints and boundaries by which its activities are contained, and those within which its activities require permits, permission, duties, or consents, to operate within or beyond. Here the domestic boundaries in which business activity can operate without consideration beyond the indigenous statutory and legislative instruments can be defined, recorded, and reviewed at planned intervals.

However, where a business activity or intentions transcend the defined domestic boundaries of the business, permits, permission, duties, or consents, to operate and manage the business activities must be determined registered, obtained, and complied with.

The Company must demonstrate consideration has been given to its activity and intentions concerning the following as it relates to its local domestic, national, and international obligations and impositions:

> a) Culture and convention expectations and compliance,
> b) Statutory and legislative requirements and stipulations,
> c) Government and religious expectations and compliance,
> d) Alignment of business risk and challenges with the strategic plan,
> e) Conduct and integrity of business activity in global operations.

We must identify the relevance and degree to which a business activity or intentions are affected by local, national, and international business considerations and prepare within its strategic plan for the known and foreseeable business opportunities and consequences.

The consideration and preparations must be assessed, developed, and reviewed at planned intervals as part of the Business Program, for suitability and relevancy, to take account and prepare action to accommodate the known current stipulations and proposed changes in the local, national and international business considerations.

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2.0   The EFQM Model Execution.

Criterion 3 Engaging Stakeholders (BMS75k Cl 0.4, 1.3, 4.0, 4.1, 4.2, 4.5, 5.0, 5.1, 5.2, 5.3, 5.5, 5.5.1, 5.5.2, 6.0, 6.1.1, 6.4.2, 6.4.3, 7.6, 8.3, 8.4, 8.7, 8.8,)

3.4 Society: Contribute to Development, Well-Being & Prosperity Continued

Clause 5.0 of BMS75k addresses the requirements for Governance and Commitment which carry a significant obligation when considering the society in which the Company operates and occupies. In respect of commitment **Clause 5.1** requires us to ensure our Company Executive Management demonstrates its governance by example, commitment, and respect for stakeholder expectations and the requirements of the Business Management System. This is achieved by

a)   Confirming a Business Management Policy Objectives are assured and understood in keeping with the Strategic Policy and intentions,
b)   Confirming the Business Management System requirements are integrated with Company Business Practices,
c)   Providing the Business Management System resources needed for the effectiveness of the,
d)   Promoting the importance of an effective Business Management System,
e)   Presiding over the managements conformance with Business Management System and its requirements,
f)   Ensuring business practices and the results achieve the agreed required objectives and outcomes,
g)   Supporting those who are tasked with developing the effectiveness of the Business Management System,
h)   Advocating continuous and permanent business activity improvements,
i)   Assisting management at all levels, with the governance and stewardship of their areas of responsibility,
j)   Communicating the importance of business activities that are core to the purposes of the organization's existence.

This answers in part the European Foundation for Quality Management 2020 (EFQM:2020) directives to contribute to the development, well-being, and prosperity of society. In addition, it assists our executive to develop an understanding of society's needs and expectations and being seen to be responsible and respectful towards them.

Clause 5.2 of BMS75k introduces the Business Management Policy which must be respectful in its objectives to the society in which we operate and occupy as a Company. Our Executive Management is required to create and publish a Business Management Policy that:

a)   Is in keeping and aligned with our purpose,
b)   Contains a mandate for establishing and measuring Business Management Objectives,
c)   Contains an acknowledgment of responsibility for the recognized Business Management requirements
d)   Contains the obligation to continually improve the effectiveness of the Business Management System,

The Business Management policy must be:

e)   Documented, controlled, and accessible
f)   In a language and format that is understood by all stakeholders,
g)   Reviewed at planned intervals for continuing suitability,
h)   Retained in a format that can be communicated to all other interested parties as appropriate
i)   Responsive to the needs and aspirations of those affected by our business activities.

The Business Management Policy document must be a controlled business record.

Clause 5.3 of BMS75k refers to Company Roles, Responsibilities, and Authorities which have an obvious obligation to contribute to the development, well-being, and prosperity of society. In addition, the empowerment and authority of the executives must be sufficient to develop an understanding of society's needs and expectations and be seen to be responsible and respectful towards them.

Executive Management must display governance and identify with our principal activities by ensuring that appropriate responsibility and authority for the principal activities are assigned to competent executives supported by trained and competent staff.

Executive Management must provide evidence of its governance and commitment to the development and implementation of the Business Management System by continually improving its effectiveness which includes:

a)   Communicating the importance of meeting stakeholder as well as statutory and regulatory requirements,
b)   Establishing and reviewing the Business Management Policy,
c)   Ensuring that Business Management objectives are established, measured, and reviewed at planned intervals,
d)   Conducting and attending Business Management Reviews, and
e)   Ensuring the availability of Business Management Systems, documented practices, and resources.

The commitment of Executive Management and the administrators in respect of the obligations to society must be assessed at planned intervals against the requirements of this Business Management Standard by independent authorities. The results of the assessment shall be published and made available to appropriate stakeholders and authorities as a controlled business record. Executive Management must delegate and assign responsibility and authority to competent executives and trained managers who are sufficiently empowered to:

f)   Ensure that the Business Management System conforms to the requirements of this Business Management Standard,
g)   Report effectively and accurately on the performance of the Business Management System to Executive Management and stakeholders,
h)   Ensure the conduct and practices of Business Management, are accountable, correct, and defendable at all times.

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2.0 **The EFQM Model Execution.**
Criterion 3 Engaging Stakeholders (BMS75k Cl 0.4, 1.3, 4.0, 4.1, 4.2, 4.5, 5.0, 5.1, 5.2, 5.3, 5.5, 5.5.1, 5.5.2, 6.0, 6.1.1, 6.4.2, 6.4.3, 7.6, 8.3, 8.4, 8.7, 8.8,)
3.4 Society: Contribute to Development, Well-Being & Prosperity Continued

Clause 5.5 of BMS75k incorporates Cultural Issues and Conventions into the executive considerations concerning the society in which we operate and occupy. The intentions in respect of current and future developments in its business operations must be covered in the strategic business plan and address cooperation with, and prevention of, infringement of all relative and appropriate national and international cultural issues and conventions with which we are required or expected to comply with accommodate, respect, or contribute towards. A register of relative national and international cultural issues and conventions must be maintained as a controlled business record. The register shall be maintained, reviewed, and updated as an item in the Business Program

We must develop and have a policy, for all relative and appropriate cultural issues and a strategy to consider their impact on the business operations and activities to accommodate differences in the collective intellectual achievements encountered through its business operations.
The cultural issues policy and strategy must communicate the standard and expectations on relative and appropriate cultural issues which vary across the organization, its activities, operations, markets, decisions, or when our activities encounter, infringe, and transcend boundaries and domains.

The standards for culture established at the pinacol of the business operations must be recognized as the Cultural Standard so that those cultural issues which differ from what we promote as relative and appropriate, can be recognized and accommodated within the policy and strategy including the differences in ideas, customs, and social behavior of a particular people, group or society which are affected by, or on which an impact is made by the activities.

Our response to those relative and appropriate cultural issues which border with our standard must be determined, documented, and communicated to the greatest practical extent, by way of example or specification, to ensure there is a conveyance and consistency of the required understanding of what is relative and appropriate at each level in the organization where the boundaries of the culture meet, or converge with operations or business activities.

Wherever possible, we must respect and abide by the relative and appropriate cultural requirements which apply within the domicile of the contracting authority with whom we are engaged, and respect and abide by the conventions applied within the boundaries and domains of the contracting authority. When this is not possible, due to statutory or legislative impositions, or because of intransient external issues, or cultural differences beyond our control, we appoint a qualified agent or intermediary who is well versed in the relative and appropriate cultural issue in question and is acceptable to the cultural authorities and has a clear understanding of all relative and appropriate cultural issue and is expedient in the culture, boundaries, limitations, and merits.

Clause 5.5.2 of BMS75k focuses on relative National and International Conventions and requires us to identify and comply with all relative and appropriate National and International conventions which it is required to, or has elected to, recognize and comply with or support, due to statutory and legislative instruments or strategic choice and policy. Compliance consists of:

a) Identifying which conventions apply and are relative to our and its business interests and activities.
b) Confirming that the business and management objectives relate and subscribe to the conventions
c) Assuring that our strategic policy and intentions do not conflict with the conventions.
d) Confirming the conventions and their prescription is incorporated into our business practices.
e) Providing the resources essential for compliance with the convention.
f) Ensuring the resources allocated are effective for complying with the conventions.
g) Promoting the Business Management System can accommodate the conventions identified.
h) Presiding over the management of conformance with all relative and appropriate convention requirements.
i) Ensuring business practices and results achieve the prescribed outcome of the convention.
j) Supporting those who are tasked with assuring convention conformance.
k) Advocating permanent and progressive compliance with the expectations of the convention improvements,
l) Assisting management in the governance and stewardship of their areas of responsibility in respect of identified appropriate conventions.
m) Communicating the requirements and expectations of the conventions identified that are core to our obligations.

The register of relative and appropriate national and international cultural issues and conventions must contain a listing of those conventions to which we maintain compliance or subscribe, as a matter of strategic policy. Our policy of conventions compliance with all relative and appropriate conventions must be published and be available to all registered stakeholders and those with a valid interest in us and our intentions.

Organizations and professional associations, which play an essential role in assisting us to identify the selection of appropriate and relative conventions must also be used to provide validation and qualification.

> **Note 1** *A Contracting authority is a person, group, organization, or state, regional or local council, an administrative body governed by public law, associations formed by one or several of such authorities, or one or several of such bodies governed by public law, but for this Business Management Standard must normally be a customer, supplier, contractor, client, creditor, debtor, or investor in the business.*

> **Note 2** *Cultural issues can prohibit or permit, class distinction, sect and racial discrimination, sex discrimination, religious intolerance, segregation of race, prohibited political persuasion, intolerance of sexual orientation, and historical interpretation of events.*

> **Note 3** *In identifying conventions relative to our business activities and interests, we may be directed by the United Nations Register of Treaties and Conventions when dealing or considering new trading relationships with a previously unknown country or domicile.*

This answers in part the European Foundation for Quality Management 2020 (EFQM:2020) directives to contribute to the development, well-being, and prosperity of society and the specific reference in this connection to the United Nations Sustainable Development Goals and Global Compact ambitions. In addition, it assists us to develop an understanding of society's needs and expectations and being seen to be responsible and respectful towards them.

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2.0   The EFQM Model Execution.
Criterion 3 Engaging Stakeholders Continued
3.5 Partners & Suppliers: Build Relationships & Ensure Support for Creating Sustainable Value.
(BMS75k Cl 0.4, 1.3, 4.0, 4.1, 4.2, 4.5, 5.0, 5.1, 5.2, 5.3, 5.5, 5.5.1, 5.5.2,6.1.1-6.1.6, 6.2, 6.2.1-6.2.7,6.2.7.1-2, 6.3, 6.4, 6.4.1-3, 7.6)
Here the European Foundation for Quality Management 2020 (EFQM:2020) directs us to Build Relationships & Ensure Support for Creating Sustainable Value with Partners and Suppliers who must be recognized as a category and a consideration within Key Stakeholder Groups.

We must use our understanding of the needs and expectations of our partners and suppliers to create and secure sustainable value. We must involve them in deploying the Business Strategy and recognizes the contributions they make to our product, service, process, and reputation.

We must build, maintain, and further develop the relationship with partners and suppliers based on transparency, accountability, ethical behavior, and trust to work with our partners and suppliers to develop a common understanding and focus on how, through co-development, it can contribute to, and draw inspiration from, the United Nations Sustainable Development Goals and Global Compact ambitions.

We actively gather details and data on the perceptions of our partners and suppliers rather than wait for them to make contact or bring issues to our attention, then evaluate our performance with our partner's and supplier's needs and take appropriate action to help secure a future, as perceived by these Key Stakeholders.

Solutions on the identification of partners and suppliers' stakeholders and a quantified attempt to identify the interest or influence each has, and their institutions have in our company activities and operations can be found in the **BMS75000:2020 Business Management Standards** following clauses and sections presented so we can **Build Relationships & Ensure Support for Creating Sustainable Value** with suppliers and partners:

0.4	**Commitment and inclusion of other management systems**
1.3	**Conventions**
4.0	**Context of the Business**
4.1	**Understanding the Company and its Relations**
4.2	**Understanding the Needs and Expectations of Interested Parties**
4.5	**External Business Considerations**
5.0	**Governance and Commitment**
5.2	**Business Management Policy**
5.3	**Company Roles, Responsibilities, and Authorities**
5.5	**Cultural Issues and Conventions**
5.5.1	**Cultural Issues**
5.5.2	**National and International Conventions**

These have already been discussed with other stakeholders, customers, people, administrators, and society. As such the same applies to our partners and suppliers so we have not expanded on their relevance or the solutions they offer in identifying our partners and suppliers.

To contribute to **Building Relationships & Ensure Support for Creating Sustainable Value** with suppliers and partners, our planning and objectives must be aligned with their interests because they are essential as providers of materials, finance, and services. In this respect, solutions can be found in the following clause contents of BMS75000:2020 Business Management Standard.

6.0	**Business Planning**
6.1	**Actions to address Risks and Opportunities**
6.1.1	**Risk Identification and Management**
6.1.2	**Make or Buy Analysis and Planning**
6.1.3	**Project Management Planning**
6.1.4	**Process Planning, Management, and Control**
6.1.5	**Outsourcing and Subcontract Planning**
6.1.6	**Goods and Service Planning Analysis and Reviews**
6.2	**Business Objectives and Plans**
6.2.1	**Business Objectives**
6.2.2	**Business Plans**
6.2.3	**Business Analysis and Planning**
6.2.4	**Market Analysis and Planning**
6.2.5	**Sales Forecasting and Realization**
6.2.6	**Financial Analysis and Planning**
6.2.7	**Budget Management and Cost Control**
6.2.7.1	**Budget Management**
6.2.7.2	**Cost Control**
6.3	**Business Continuity**
6.4	**Management of Change**
6.4.1	**Indigenous Change Preparation and Management,**
6.4.2	**External Change Preparation and Management,**
6.4.3	**Planning and Accommodating Unforeseen Issues,**
7.6	**Resource and Support for External Influences**

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2.0   The EFQM Model Execution.
Criterion 3 Engaging Stakeholders
3.5 Partners & Suppliers: Build Relationships & Ensure Support for Creating Sustainable Value. Continued
(BMS75k Cl 0.4, 1.3, 4.0, 4.1, 4.2, 4.5, 5.0, 5.1, 5.2, 5.3, 5.5, 5.5.1, 5.5.2,6.1.1-6.1.6, 6.2, 6.2.1-6.2.7,6.2.7.1-2, 6.3, 6.4, 6.4.1-3, 7.6)
Building Relationships & Ensure Support for Creating Sustainable Value with suppliers and partners, is an essential consideration for our operations
management. In this respect, solutions can be found in the following clause contents of BMS75000:2020 Business Management Standard.

8.0	**Business Operation**
8.1	**Operational Planning and Control**
8.1.1	**Financial Administration and Accounts**
8.1.2	**Marketing and Public Relations**
8.1.3	**Customer Services and Support**
8.1.4	**Technical Services and Support**
8.1.5	**Goods and Service Management and Distribution**
8.1.6	**Process Management and Stewardship**
8.1.7	**Servicing and After-Sales Administration**
8.1.8	**Goods, Service, and Process Configuration Management**
8.2	**Customer-Related Business Activities**
8.3	**Research and Development Business Activities**
8.4	**Design and Selection Business Activities**
8.5	**Purchasing Business Activities**
8.6	**Business Goods and Service Processes**
8.7	**Control of Non-conforming Products and Services**
8.8	**External Business Operational Influences**
8.8.1	**Determining External Business Operational Influences**
8.8.2	**Monitoring External Business Operational Influences**

The European Foundation for Quality Management 2020 (EFQM:2020) requires us to build, maintain and further develop the relationship with our suppliers
and partners. This must create a common understanding and focus on how, through co-development, we can draw inspiration from its obligations and
contribution to partners and suppliers. We are directed to actively gather details of the perceptions of partners and suppliers on our company and its activities
and evaluate our social performance to take appropriate action when our social accountability is found to need repair or redirection. Solutions can be found in
the application of Sections 9 and 10 of the **BMS75000:2020 Business Management Standard** which contains the following subjects:

9.0	**Business Performance Evaluation**
9.1	**Monitoring, Measurement, Analysis, and Evaluation**
9.1.1	**Monitoring and Measurement of Processes**
9.1.2	**Monitoring and Measurement of Goods and Services**
9.1.3	**Shareholder Perception Evaluation**
9.1.4	**Customer Satisfaction and Perception Evaluation**
9.1.5	**Employee Perception Evaluation**
9.1.6	**Supplier Perception Evaluation**
9.1.7	**Stakeholder's Perception, Expectations, and Satisfaction**
9.3	**Management Review**
9.4	**Management of Unforeseeable Events**
10.0	**Business Improvement**
10,1	**Opportunities for Improvement**
10.2	**Nonconformity and Corrective Action**
10.2.1	**Non-conformance Identification and Containment**
10.2.2	**Root Cause Analysis**
10.2.3	**Corrective Action**
10.2.4	**Preventive Measures**
10.3	**Continual Improvement.**

Clause 6.0 of BMS75k introduces the need for Business Planning which requires detail and information from our suppliers and partners in its preparation and
commitment. The first consideration in this section is covered in Clause 6.1 which addresses Actions to Address Risks and Opportunities. Here we must
consider the context of its operations, activities, and purpose by assessing the needs and expectations of interested parties when planning for the Business
Management System. We must identify risks that are detrimental to its interest and opportunity risks that need to be realized in the interest of its
stakeholders. To ensure the Business Management System can achieve its intended results we must:

a)   Identify and prevent risks that are detrimental to our interests,
b)   Eradicate or contain all identified detrimental activities and their consequences
c)   Identify and embrace business risks and opportunities that are of benefit to its purpose,
d)   Use the Business Management System to prevent detriment to its interests,
e)   Continually monitor, review, and analyze results to determine the need for change
f)   Determine and report on the effectiveness of any actions taken.
g)   Improve the quality of management at all levels continually.

These practices must be identified, documented, and integrated into our programs and their contribution to the Strategic Business Plan monitored and
recorded as a controlled business record to establish, implement, and maintain, in a documented practice, the activities required for managing all identified or
foreseeable detrimental risks and their consequences including:

h)   assignment of responsibilities for risk management
i)   characteristics of the risks identified (e.g., likelihood, consequences, mitigation, and acceptance),
j)   assessment, conveyance, and communication of risk consequences to managers and staff
k)   management of actions to eliminate or mitigate risks that exceed the defined risk acceptance criteria,
l)   accommodations for risks remaining after containment and mitigation action

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The practices for risk identification and management must also be the subject of a documented practice.

2.0 **The EFQM Model Execution.**
Criterion 3 Engaging Stakeholders
3.5 Partners & Suppliers: Build Relationships & Ensure Support for Creating Sustainable Value. Continued
(BMS75k Cl 0.4, 1.3, 4.0, 4.1, 4.2, 4.5, 5.0, 5.1, 5.2, 5.3, 5.5, 5.5.1, 5.5.2,6.1.1-6.1.6, 6.2, 6.2.1-6.2.7,6.2.7.1-2, 6.3, 6.4, 6.4.1-3, 7.6)
Clause 6.1.2 of BMS75k covers the subject of Make or Buy Analysis and Planning which requires us to demonstrate that in all principal activities the costs and benefits of using internally acquired resources have been planned by comparing the options to purchase or hire from suitable suppliers or sub-contractors. Make or buy considerations must include as appropriate

a) Associated risks and opportunities
b) Cost and value of each option
c) Timeliness and program
d) The totality of the problem solution and transfer of ownership
e) Relative goods, or service quality
f) Availability and sustainability of capacity
g) Loss of experience, know-how, goodwill, and other intellectual property.

The make-or-buy decision must be reviewed from the full perspective of available facilities and resources with due consideration to each option and its impact on:

h) Maximum utilization of facilities and resources.
i) Transfer or conversion of underemployed facilities and resources.
j) Maintenance, reduction, and disposition of facilities and resources.

The impact on our stakeholders be considered and, those persons or authorities that can affect, be affected by, or perceive themselves to be affected by the make or buy decision.

The practices for making or buying business activities must be the subject of a documented practice and the decision to make or buy shall be recorded and the record recognized as a controlled business record.

Clause 6.1.3 of BMS75k addresses the subject of Project Management Planning and requires us to plan and manage the operations within our control in a structured and controlled manner to meet requirements at acceptable risk, within the resource and schedule constraints. Business solutions must be project managed to achieve an effective planned solution, as well as to contribute to the learning within projects and continually improve our management capability. The practices for project management be the subject of a documented practice or an equivalent method.

> **Note:**   *BMS75k directs us to obtain guidance on establishing and maintaining a project management system, to ISO21500:2012 or BS6079:2019 BS 6079:2019 Project management - principles and guidance for the management of projects.*

Clause 6.1.4 of BMS75k introduces the need for Process Planning, Management, and Control in connection with Building Relationships to Ensure Support for Creating Sustainable Value with suppliers and partners.

Processes used within the conduct of the business which add value to the goods and services produced or provided must be planned and controlled. Planning of business processes must also be consistent with the requirements of the other processes of the documented Business Management System.

In planning these processes, we must determine the following, as appropriate to the business:

a) activities and requirements for the processes involved.
b) objectives and requirements for the product of the processes including:

- goods and service integrity and safety in use
- reliability, availability, and maintainability
- producibility and inspectability
- suitability, integrity, and traceability of materials, components, and services used
- ownership, status, and configuration of software, programs, and other intellectual property
- precautions against counterfeit sub-tear goods and services
- recycling or final disposal of the goods and services at the end of their life.

c) the need to establish Business Programs that prescribe processes, documents, and resources specific to the business.
d) required process monitoring, measurement, verification, validation, checks, and test activities
e) resource specific to the process and the criteria for completion.
f) records needed to provide evidence that the processes and results achieved prescribed requirements
g) configuration management appropriate to the process documents, data, programs, and records
h) resources to support the use and maintenance of the process plans and Business Programs

The output of this planning must be in a form that can be communicated and understood by the affected parties and suitable for our method of operations. This output is recognized as a controlled business record.

> **Note 1**   *A document specifying the processes of a management system (including business processes) and the resources and sequence to be applied for a specific project or contract, can be referred to as a Business Program.*

> **Note 2**   *We may also apply the requirements given in research and development to the development of process management, Business Programs, and individual business processes.*

We must have a continuous improvement management project and produce a Business Program**,** incorporating planned processes for business effectiveness and efficiency incorporating innovation flexibility, and integration with the Company's goods, services, and processes.

> **Note 3:**   *Process effectiveness assessment reporting is often referred to as PEARs.*

The practices for process planning and control must be the subject of a documented practice or an equivalent method.

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Criterion 3 Engaging Stakeholders

3.5 Partners & Suppliers: Build Relationships & Ensure Support for Creating Sustainable Value. Continued

(BMS75k Cl 0.4, 1.3, 4.0, 4.1, 4.2, 4.5, 5.0, 5.1, 5.2, 5.3, 5.5, 5.5.1, 5.5.2,6.1.1-6.1.6, 6.2, 6.2.1-6.2.7,6.2.7.1-2, 6.3, 6.4, 6.4.1-3, 7.6)

Clause 6.1.5 of BMS75k incorporates the subject of Outsourcing and Subcontract Planning and requires a Company to consider outsourcing those tasks and activities for which it can perform but insufficient resources to complete its obligations in a timely or effective manner. Outsourcing or sub-contracting must only be undertaken following a make-or-buy evaluation and assessment when it is in the interest of the Company to do so.

Outsourcing of processes cannot absolve the Company of the responsibility of conformity to all customers, statutory and regulatory requirements. Outsourcing and sub-contracting must be controlled to ensure:

a)   Known or foreseeable risks have been mitigated by the action taken
b)   No residual risk remains with the Company for which control is not exercisable
c)   Cost and value to the Company are known or calculable
d)   Timeliness and program are achievable or predictable
e)   Ownership of the problem is transferred
f)   Quality considerations are not compromised
g)   Strategic business objectives and responsibilities are protected
h)   Safeguards are provided against loss of experience, intellectual property, know-how, goodwill, and provenance.

The outsourced subcontracted tasks or activities must be conveyed to the contractors in written form to ensure progress and completion can be verified by each party involved in the agreement.

Sub-Clause 6.1.6 of BMS75k introduces Goods and Service Planning Analysis and Reviews as a contributor to Building Relationships to Ensure Support for Creating Sustainable Value with suppliers and partners. The Company must plan, review, and analyze available data for the goods and services it produces or provides. Goods and service planning must be used to manage the goods and services and decisions needed during each phase of a life cycle which must include as appropriate:

a)   The introduction and withdrawal of goods or services.
b)   Risks associated with the goods or service.
c)   Goods or service ownership, configuration, and responsibility.
d)   Goods and service costing, sales, revenue, profits, forecasting, and development.
e)   Understanding of the customers' needs and use relating to the goods or service.
f)   Goods and service development and improvement to exceed customers' expectations.
g)   Suitability, integrity, and traceability of programs, materials, components, processes, and services used.
h)   Selection and partnering of suppliers and their contributions to the goods or service.
i)   Producibility, inspectability, and criteria for correctness and completion of the goods and service.
j)   Ownership of goods or services intellectual property, patents, and licenses.
k)   Goods and service reliability, availability, and maintainability.
l)   Goods and service integrity, precautions against counterfeit goods, and safety in use.
m) Goods and service compliance with specified standards, known expectations, and statutory instruments.
n)   Obligations in respect of migration, retirement, obsolescence, and replacement.
o)   Recycling or final disposal of the goods and services at the end of their life.
p)   Directions to and contributions from other internal operations and activities within the Company.

These aspects and applications of the goods and services must be assessed, analyzed, and reviewed at planned intervals to improve the goods and service success during each of the phases of its life cycle (development -introduction – growth – maturity – decline). As part of each assessment or review, the Company must demonstrate through documented knowledge of the goods and services provided:

q)   An understanding of how the goods or service works within its known applications,
r)   The resources, including know-how, needed for the continued production or delivery of the goods or service
s)   The resources and arrangements needed for the in-service support of the goods and services
t)   Obligations and commitments for suitable arrangements to provide for the replacement of obsolete items.
u)   The legal and statutory requirements applicable to the production, sale, and use.
v)   Protection and provision for recourse against counterfeit goods and services.

The analysis and review of goods and service planning must be recorded as a controlled business record and the practices for goods and service planning analysis and reviews must be the subject of a documented practice or an equivalent method.

Clause 6.2 of BMS75k considers the role of Business Objectives and Plans to Build Relationships to Ensure Support for Creating Sustainable Value with suppliers and partners. This clause is an extensive requirement incorporating several subclauses each with specific directives including:

6.2.1   Business Objectives
6.2.2   Business Plans
6.2.3   Business Analysis and Planning
6.2.4   Market Analysis and Planning
6.2.5   Sales Forecasting and Realization
6.2.6   Financial Analysis and Planning
6.2.7   Budget Management and Cost Control
6.2.7.1   Budget Management
6.2.7.2   Cost Control

Executive Management must ensure that business objectives, including those needed to meet requirements for the Company's goods or services, are established at relevant functions and levels within the Company. The business objectives must be measurable, consistent, and traceable to directives within the Company Business Policy. Each business objective has targets that must be suitable, measurable, achievable, and time-based. Objectives must be used to monitor and check each principal activity that is core to the operation and continuation of the Company Each objective shall be identified with its process and be a constituent and reporting item within the Company's continuous improvement plan and be recognized and referred to in the process effectiveness evaluation reports as a controlled business record.

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Criterion 3 Engaging Stakeholders

3.5 Partners & Suppliers: Build Relationships & Ensure Support for Creating Sustainable Value. Continued

(BMS75k Cl 0.4, 1.3, 4.0, 4.1, 4.2, 4.5, 5.0, 5.1, 5.2, 5.3, 5.5, 5.5.1, 5.5.2,6.1.1-6.1.6, 6.2, 6.2.1-6.2.7,6.2.7.1-2, 6.3, 6.4, 6.4.1-3, 7.6)

Clause 6.3 of BMS75k introduces the importance of Business Continuity when Build Relationships to Ensure Support for Creating Sustainable Value with suppliers and partners.

The Company must have a Business Continuity Plan which identifies the Company's exposure to internal and external threats and provides for effective prevention and recovery should such threats be realized or encountered. The plan must provide a proposed informed solution for continuing business activities and operations under adverse conditions.

The plan must define how to continue operations, or the delivery of services, during disruption or interruptions resulting from all foreseeable adverse events such as industrial action, fires, floods, power outages, theft, vandalism, earthquakes, and pandemics.

Any event that could impact Company operations and business activities must be considered, such as loss of key personnel, supply chain interruption, loss of, or damage to critical infrastructure (major machinery or computing/network resource). Risk management must be incorporated as part of the Business Continuity Plan to reduce operational risk and be documented and recognized as a controlled business record.

> *Note:*   *For guidance on establishing and maintaining a Business Continuity Plan, please refer to ISO22301, the international standard for Social Security-Business Continuity Management Systems-Requirements.*

Clause 6.4 of BMS75k commends the subject of Change Management when Building Relationships to Ensure Support for Creating Sustainable Value with suppliers and partners.

The Company must develop and maintain a documented practice to manage indigenous, foreseeable, and unforeseeable changes needed to improve, direct or accommodate a change in its Business Management System and Business Objectives.

In addition, the documented practice must also cover indigenous changes arising from the operation of the Business Management System, which present changes needed to complement, advance, or are advantageous to the Business Management System and the core purpose and interests of the Company**.**

This management of change practice must also contain a prescription for the identification and monitoring of known external matters which affect the current interests or operations within the Company over which the Company has no direct control but maintains the knowledge and intelligence needed to recognize when there is movement in their direction or occurrence. The prescription sets out a standard practice to recognize when known external matters require changes to be made within the Company activities.

The practice must also contain a prescription to recognize the occurrence of unforeseeable events which impose a change on the Company's Business Management System or its agreed objectives. These unforeseeable matters cannot be anticipated or planned for, because they are:

    a)   Beyond the realm of regular plausible expectations,
    b)   Beyond the Company's influence to control or prevent,
    c)   Explanations for changes or direction can only be made after the event,
    d)   Only rationalized by way of hindsight.

When changes to the company's Business Management System are required due to indigenous, foreseeable, or unforeseeable events, their introduction must be authorized at the appropriate level, planned, recorded, and communicated. All changes to the Business Management System must be introduced under a controlled management practice and can only proceed after completing a thorough and full technical evaluation of the known and foreseeable events and consequences resulting from the change.

Changes must be communicated to all affected or interested parties and functions, which includes partners and suppliers, to prevent inconsistency between policy, procedure, practice, and record. This must ensure the integrity of the Business Management System is always maintained, for control and continuity of the Company objectives and purpose.

Accountability for all change results, and decisions, must be determined and recorded to ensure all matters are traceable to the authorities tasked with the decisions made, and that decisions made are defendable at all times and tractable to the records and information available at the time of a decision, and on which decisions were reached. Completion of a change to the Business Management System must be incorporated into the company practices for configuration control and must be reflected in the build standards for the products and services provided. Records are produced and maintained of all change management decisions and must be recognized as a controlled business record.

Sub-Clause 6.4.1 of BMS75k details the requirements of Indigenous Change Preparation and Management and requires the management of change documented practice must specify the planned and continuous assessment and review of the Business Activity, with an evaluation of its Business Management System and related processes to determine compliance and correctness of the Business Management System with this Business Management Standard or if changes are required. Indigenous change planning and preparation must be applied to matters over which the Company has the most control and influence. This must include as appropriate

    a)   Change in the scope of the Business Management System.
    b)   Policy changes or amendments.
    c)   Product and service change.
    d)   Process change.
    e)   Procedure change.
    f)   Change in Employee skills and know-how.
    g)   Change in Management style and structure.
    h)   Changes in capacity and output.

All indigenous changes to the Business Management System must be authorized at the appropriate level, evaluated as suitable and appropriate, and registered in a revision under the established and documented configuration control practices.

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(BMS75k Cl 0.4, 1.3, 4.0, 4.1, 4.2, 4.5, 5.0, 5.1, 5.2, 5.3, 5.5, 5.5.1, 5.5.2,6.1.1-6.1.6, 6.2, 6.2.1-6.2.7,6.2.7.1-2, 6.3, 6.4, 6.4.1-3, 7.6)
Sub-Clause 6.4.2 in BMS75k details the requirements for External Change Preparation and Management requiring the Company to determine the extent to which all foreseeable changes in known external matters can affect their own planned objectives and current business program.

Each assigned authority must have become conversant with the sources, consequences, and influence of such matters, and provide for their mitigation by way of contingencies within their contributions to the Company's strategic plan. This must be incorporated and completed as part of the Company practices for risk management. The Company must identify the relevance and degree to which any external activity affects its practices and objectives. This includes the degree to which the subject influences, benefits, or detracts from the current business program and the strategic plan.

The Management of Change documented practice must include the recognition of external subjects that require the Company to have knowledge and intelligence of their stability, constancy, or volitivity and the subsequent consequence and relationship to the Company Objectives. The selection and monitoring of all known relative external subjects and issues must be determined by their relationship with Company Objectives or the degree to which their conduct and passage can compromise an aspect of the Business Management System. Changes in these issues and the need for action must depend on:

a) Relationship of the issue to a company objective or practice,
b) The extent to which changes require adjustments to internal company matters,
c) Changes being within the realm of regular plausible expectations,
d) An internal ability to accommodate. influence or prevent detriment,
e) An internal ability to realize a benefit from a change or development,
f) Change frequency, predictability, or likelihood,
g) Know-how and intelligence of the scope and boundary of the issue,
h) Degree and extent to which mitigation methods can be applied,
i) The strategic decision to act when limits have been reached or exceeded.

The Company must recognize at the earliest posable stage when an external matter or occurrence must impact the Business Management System. Consideration given to the event must be recorded and registered. The register must be used to record all relative matters which have a known influence on the realization of Business Objectives and the Business Management System. This must be maintained as a controlled business record. A review of all registered matters is provided for within the company Business Program**.** The degree to which these matters influence the selections of business objectives and the planned action required for their mitigation must be the subject of the company's own risk management systems.

Sub-Clause 6.4.3 of BMS75k covers the Planning and Accommodation of Unforeseen Issues which are events or occasions that have occurred outside of the scope of the Company Business Management System, but are having, or going to have an effect or influence on the Company objectives and are requiring the Company to recognize and identify such events and occasions that impact on its Business Management System and objectives, at the earliest posable stage. Unforeseen external issues are only deemed to be unforeseeable when the issue impacts significantly and directly on the planned arrangements of the company, and are proven to be:

a) Beyond the realm of regular plausible expectations,
b) Beyond the Company's influence to control or prevent,
c) Explanations for conduct or direction can only be made after the event,
d) Only rationalized by way of hindsight,
e) Its influence on company interests was not a reasonable conclusion.

Supply chain considerations in single-sourced arrangements can expose a business activity to detriments which include increased tariffs, trade bans, and delivery delays. The Company must determine the extent to which all these unforeseeable issues affect the business program and core purpose. Each assigned authority must become conversant with the issue, and prepare recommendations for subsequent consideration, approval, and authorization at the appropriate level. Their identification, analysis, and assessment must commence with acknowledging the relevance of an unforeseen external event and provision for addressing its implications provided, within the business program. The review of relative unforeseeable issues must include:

f) Adequacy of current political risk and other relative insurance,
g) Supply chain and logistical operations,
h) Finance liquidity, banking strategy, and access to domestic currency,
i) Tailoring the nature of the business to the nature of the risk, and specifics of the market.
j) Regular advice and consultation from informed authorities,

Unforeseen external issues include maters arising from local, domestic, national, and international events and impositions which prevent or interfere with the current company Business Program including changes in:

k) Culture and convention expectations and compliance,
l) Statutory and legislative requirements and stipulations,
m) Government and religion expectations and compliance,
n) Alignment of business risk and challenges with the strategic plan,
o) Conduct and integrity of business activity in global operations.

Matters and decisions taken outside of the Company by National and International Authorities can have an impact or influence on the ability of the Company to realize its business objectives. These are identified as Exogenous or External Issues such as the application of taxes or tariffs on the goods or services which a Company produces, purchases, or provides.

There is no universal solution to situations when national or international political risks start interfering with business plans. Risk management in general is a very sensitive and complex concept that requires a unique approach to every single issue. Political risk insurance can be considered for the protection of businesses and international companies that operate within developing economies. Provision exists in such arrangements for protection in the event of acts of expropriation, political unrest and violence, war and terrorism, capital repatriation, and sovereign debt default.

Consultation authorities can include Chambers of Commerce, Embassy Trade Counters, Credit & International Business Association, Globe Risk International, and Multilateral Investment Guarantee Agency.

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2.0   **The EFQM Model Execution.**
Criterion 3 Engaging Stakeholders
**3.5 Partners & Suppliers: Build Relationships & Ensure Support for Creating Sustainable Value. Continued
(BMS75k Cl 0.4, 1.3, 4.0, 4.1, 4.2, 4.5, 5.0, 5.1, 5.2, 5.3, 5.5, 5.5.1, 5.5.2,6.1.1-6.1.6, 6.2, 6.2.1-6.2.7,6.2.7.1-2, 6.3, 6.4, 6.4.1-3, 7.6)**

Clause 7.6 of BMS75k supports the above by requiring Resources and Support for External Influences and requires us to determine the resources required for known external national and international business activities in which it is engaged or intends to be operating. This must include Company obligations and intentions in respect of National and International Business Activities such as:

a)   Scope Considerations
b)   Business Considerations
c)   Cultural Issues and Conventions
d)   Planning and Objective Matters
e)   Performance Evaluation and
f)   Improvements

We must anticipate, assess, accommodate, analyze and account for all resource requirements needed to address and accommodate National and International Business Activity. The resources needed to accommodate National and International business activity must be financed by provisions within the financial plan and allocated to assigned authorities for the achievement of their objectives and goals as detailed in the Strategic Plan and provided for in the business program.

2.0   **The EFQM Model Execution.**
Criterion 4:   **Creating Sustainable Value.**
The European Foundation for Quality Management 2020 (EFQM:2020) directs us to Create Value insisting in its positioning statement that an outstanding organization recognizes that Creating Sustainable Value is vital for its long-term success and financial strength.

EFQM:2020 insists that an organization's clearly defined Purpose, enriched by the Strategy, defines for whom the organization should be Creating Sustainable Value.

This in most cases is customers, segmented appropriately, are the target group for Creating Sustainable Value, but the EFQM 2020 accepts that some organizations might also focus on selected Key Stakeholders within its Society or Business & Governing Stakeholder segments.

An outstanding organization acknowledges that Key Stakeholder needs must change as trends, priorities, and practices developed over time and that it is important to collect and analyze feedback to improve or change the products, services, or solutions we use.

The European Foundation for Quality Management 2020 (EFQM:2020) states that the different elements of Creating Sustainable Value are:

4.1   Design the Value & How it is Created
4.2   Communicate & Sell the Value
4.3   Deliver the Value
4.4   Define & Implement the Overall Experience

The European Foundation for Quality Management 2020 (EFQM:2020) recognizes that the organization's plans for today and the future may well run in parallel or overlap at times, depending on the nature of the organization's business.

In seeking solutions from BMS75000:2020 Business Management Standard for Creating Sustainable Value the prime subjects we can refer to are:

4.1	**Design the Value & How it is Created**	**BMS75k Clause 8.3**	**Research and Development Business Activities**
4.2	**Communicate & Sell the Value**	**BMS75k Clause 8.2**	**Customer Related Business Activities**
		BMS75k Clause 8.4	**Design and Selection Business Activities**
4.3	**Deliver the Value**	**BMS75k Clause 8.1**	**Operational Planning and Control**
		BMS75k Clause 8.6	**Business Goods and Service Processes**
4.4	**Define & Implement the Overall Experience**	**BMS75k Clause 9.0**	**Business Performance Evaluation**

Value creation is normally assumed to be a customer-centric problem or issue but we must also consider the value created in the interest of other stakeholders. The European Foundation for Quality Management 2020 (EFQM:2020) when referring to Criterion 3 directed us to Engaging Stakeholders and instructed us to consider the 5 prime entities:

3.1	**Customers:**	Build Sustainable Relationships
3.2	**People:**	Attract, Engage, Develop & Retain
3.3	**Business & Governing Stakeholders** –	Secure & Sustain Ongoing Support
3.4	**Society:**	Contribute to Development, Well-Being & Prosperity
3.5	**Partners & Suppliers:**	Build Relationships & Ensure Support for Creating Sustainable

We must accept that Value Creation is the process of converting labor and resources into a product or service which has a use or purpose for others. This can include tangible handleable products or intangible property such as intellectual property and creative ideas.

To be a leading successful business we need to understand that the objective of any business activity must create value for stakeholders, and the interests of the above-listed groups are complimentary. Therefore, the task for executives and senior management is to develop the value which is core and common to most of the stakeholders and accommodate to the greatest posable extent the aspirations of each group.

Creating sustainable customer value is a core policy of every successful company because creating value for customers puts down the foundations on which the sale of the products and services can proceed without encountering obstacles. Likewise, creating profits for shareholders in the form of an increase in dividends and stock prices ensures the availability of investment capital to fund current and future business activities and operations.

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2.0   The EFQM Model Execution.

Criterion 4:   Creating Sustainable Value.

Creating sustainable value requires the cooperation and approval of all our stakeholders collectively and individually. We must appreciate that not all stakeholders must be able to identify with the company's products and services because of the prospective from which the stakeholder views the business. Customers and employees must have an identity with the products they produce and purchase, but investors and society, partners, and suppliers must only see the products and services by their values, detriments, and contribution, financially and ecologically. We must therefore see what the value of association and contribution is from each group before we can commence designing the value and how best to create it sustainably.

Value Creation for a Customer.

Value Creation in Business refers to a process involving the offering of a product or service to a customer and helping the customer satisfy a need. In exchange for this, the Company is rewarded with payment or other material with an agreed-upon value. We must therefore create products & services which meet a customer's requirements and expectations.

Such customer-centric value creation is realized from a product or service, innovation process, derived from a clear and precise understanding of a customer's needs and converting it into a product and service which satisfies the needs or exceeds them.

Value Creation for People

Companies need resources which includes human resources to produce the products and services a customer must purchase and use. No Company can deliver outstanding products and services without professional and dedicated employees. Creating Sustainable Employee Value must therefore also be part of creating sustainable considerations. Employees need motivation for them to give their best in achieving the overall business goals.

Such employee-centric value includes being respected, valued, and appreciated in discharging their duties in a commendable and correct fashion. Employees need to be respected and included in the decision-making process. Employees also contribute more by having compensation plans, meaningful work, and continued development and training.

Value Creation for Business and Governing Stakeholders

Senior Governance and Investment stakeholders who play a major role in the Sustainability of the Company are the prime decision-makers and are responsible for the long-term future of an organization. The prime consideration here is the Administrative Executive Board and Principal Shareholders because the Executive Board are the strategic decision makers influenced by the Principal Shareholders and other know and active influential authorities.

Business and Governing stakeholders' interests and contributions need to be rewarded with recognition and support. Creating value for this executive influential group. Creating value for investors and executives involves delivering high returns on their contributions and capital consistently. This requires attractive bonus arrangements, good and sustainable profit margins, and strong revenue growth. All these can only be achieved if a business delivers sustained value for interested parties, in particular its customers.

Value Creation for Society

The survival and continuity of a Company must depend greatly on its purpose which needs to be accepted by the society in which it operates. Business performance is not just assessed against economic performance or profit, but its conduct and contribution to matters of environment and welfare are equally important to its stakeholder. Companies of any type must be aware and concerned with their ecological and social performance in addition to financial welfare. In all companies, economics must be a restraint on what is done and what its managers can do, it should not, therefore, be its sole objective.

Such society-centric value includes a contribution to the welfare and social fabrics as well as a concern for the environment and the ecology of the society in which we operate and occupy by building, maintaining, and further developing the relationship within the society based on transparency, accountability, ethical behavior, and trust to create a common understanding and focus on how, through co-development, the Company can contribute to society as well as derive resources from it in a respectful and concerned fashion.

Value Creation for Partners & Suppliers

Companies rely on partners and suppliers to provide support so we can build relationships and ensure their support for creating a sustainable product and service value. The European Foundation for Quality Management 2020 (EFQM:2020) requires the Company to build, maintain and further develop the relationship with our suppliers and partners. This must create a common understanding and focus on how, through co-development, the Company can draw inspiration from its obligations and contribution to partners and suppliers.

Such partner and supplier-centric value are progressed by building the supply chain on dependable and collaborating sources, prompt resolution of difficulties in payments, actively gathering details of the perceptions of partners and suppliers on our company and its activities, and evaluating our social performance to take appropriate action when our social accountability is found to need repair or redirection.

BMS75k insists that there must be a synergy between the company culture, strategy, and policy when considering the solutions for creating and maintaining a defendable and respected position for the product and service from customers and competitors. This is explored in depth when considering the available solutions including the administrative directives discussed earlier and available from the following section and sub-clauses.

4.0	**Context of the Business**
4.1	**Understanding the Company and its Relations**
4.2	**Understanding the Needs and Expectations of Interested Parties**
4.2.3	**Identification of Business Stakeholders**
4.2.4	**Customer Responsibility and Focus**
4.5	**External Business Considerations**
5.0	**Governance and Commitment**
6.0	**Business Planning**
6.1	**Actions to address Risks and Opportunities**
6.1.1	**Risk Identification and Management**
6.1.2	**Make or Buy Analysis and Planning**
6.1.3	**Project Management Planning**
6.1.4	**Process Planning, Management, and Control**
6.1.5	**Outsourcing and Subcontract Planning**
6.1.6	**Goods and Service Planning Analysis and Reviews**

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2.0   The EFQM Model Execution.

Criterion 4:   Creating Sustainable Value Continued.

4.1 Design the Value & How it is Created.

Having determined and assessed the value each stakeholder places in their association with, or contribution to, the company, we can respond from an informed position to designing and developing products and services which provide engage the interest and appetites of the stakeholders in creating such value. In this respect, solutions can be found in the following clause contents of BMS75000:2020 Business Management Standard.

8.0	**Business Operation**
8.1	**Operational Planning and Control**
8.2	**Customer-Related Business Activities**
8.3	**Research and Development Business Activities**
8.4	**Design and Selection Business Activities**
8.5	**Purchasing Business Activities**
8.6	**Business Goods and Service Processes**
8.7	**Control of Non-conforming Products and Services**
8.8	**External Business Operational Influences**
8.8.1	**Determining External Business Operational Influences**
8.8.2	**Monitoring External Business Operational Influences**

Clause 8.0 of BMS75k introduces us to the initial solution for designing the value and how it is created by requiring the Company to identify the operational processes with which to manage the operational business activities stated in the Strategic Plan. These processes must be controlled and documented to the greatest practical extent in process plans, documented practices, task instructions, and work instructions, for consistency in operations and to communicate requirements to operational or service delivery departments and authorities. The requirements for each operational process must include those needed for

a)	Commencing the process	(Inputs)
b)	Activities involved in the process	(Practices)
c)	Product of the process	(Outputs) and

In addition, we must produce the means to measure the timeliness, quantity, and quality of the product of the processes at each stage in its sequence.

Note: *Each process shall normally only have a single product but may depend on numerous inputs and contain several activities in sequences that must follow a defined route. Such multi-dependent activities when documented are referred to as a Process Plan.*

Clause 8.1 of BMS75k addresses the subject of Operational Planning and Control which is essential if the Company intends to plan, implement, monitor, and control each of the operational processes and business activities identified in the Strategic Plan. This is achieved by:

a)	Determining and communicating the criteria for the operational business activities and their processes in a Business Plan,
b)	Implementing control of the business processes by monitoring business activities and performance under the provisions made in the Business Plan
c)	Completing and retaining records necessary to demonstrate that the business processes have been carried out as planned.

Management of all intended changes in each business process must be planned and reviewed to the greatest practical extent so that the consequences of any unintended changes are removed**.**

All risks identified because of operational processes and changes to planned requirements are managed under the provisions and practices detailed in clause 6.1.1 of the BMS75k Standard covering Risk Management.

Changes to planned requirements are only actioned after completing a thorough technical and comprehensive review and evaluation of the changes intended and their impact on the business activities of the company and all interested parties and stakeholders. The review, evaluation, and consequences of each change are determined and recorded as a controlled business record.

Note: *Where the Business activity technology or orientation is labor intensive, provision for a separate section in the strategic plan can be given over to Human Resources although the contribution of human resources and requirements for skills and know-how is considered as part of the duties and responsibilities of the vocational subject sections.*

Clause 8.2 of BMS75k addresses the subject of Customer Related Business Activities which is a prime consideration for Designing Value and how to produce it. The solution is structured in 5 subclauses consisting of

8.2.1	**Determination of Requirements**
8.2.2	**Review of Requirements**
8.2.3	**Review of Requirement Applications and Use**
8.2.4	**Customer Use Lifecycle Support and Provision.**
8.2.5	**Customer Communication**

The Company must have a procedure to record and account for all customer-related business activities including the customers' specified requirements, terms and conditions of purchase or sale which can include goods and service delivery, business conduct, and after-sales activities. In addition, a customer's requirements must include:

a)	Known requirements omitted by the customer but known to be applicable and important by the Company,
b)	Business activities, goods or services, statutory and regulatory requirements that are known to be relative,
c)	Any known requirements for the protection of the customer or interests of other stakeholders.

Customers' requirements normally relate to the supply of goods or services but can also include requirements known to the Company that is derived or determined by the special circumstances, conditions, or known application to which the business activity, goods, or service is intended to be used or applied.

After-sales and service requirements include the provisions of guarantees, bonds, undertakings, and obligations. These shall include, but not be limited to, environmental responsibilities or final clearance after use, conservation services and in-service support such as obsolescence provision, and retention of records, goods replacement, business continuity, and provision for the investigation and reporting particularly in the event of a non-detected or benign failure.

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2.0   **The EFQM Model Execution.**
    Criterion 4:   Creating Sustainable Value
    4.1 Design the Value & How it is Created Continued.

Sub-Clause 8.2.2 of the BMS75000:2020 Business Management Standard specifies that the Company must review customers' requirements, evaluate and record as a controlled business record all customer requirements related to each business activity, identifying the product or service and the version being offered or provided. This review must be conducted before the start of each customer-related business activity to ensure that:

    a)   Customer-related business activity requirements are known and understood,
    b)   The requirement is declined if it cannot be matched with a product or service that is compatible and suitable
    c)   Amended requirements which conflict with those previously agreed upon are resolved,
    d)   The Company shall be capable of fulfilling all known requirements.
    e)   Special requirements of each customer are determined and addressed
    f)   The risk associated with each business customer-related activity has been identified
    g)   There is a sufficient return to the Company on the investment to be made, or the decision to proceed is recorded as considered defendable.

The customer-related business activity must not commence before the review of requirements has been completed and recorded. When the review identifies the need for clarification or changes in the requirement, we must ensure records are amended and the current known requirement is being applied or provided.

All authorities involved must be informed and made aware of any changed requirements and the master record index must record the current customer-related business activity details and known requirements agreed with the customer. Business Records of the review of requirements must be completed and retained as a controlled business record traceable to an authorized and competent authority.

Sub-Clause 8.2.3 of BMS75k directs us to Review Requirements for Applications and Use when the customer depends on the advice and know-how of the Company *(e.g., for sizing or quantifying a requirement based on a statement of application or duty).* The Company must be responsible for the advice, recommendation, or offer given and must ensure that the goods and services offered or provided can fulfill the known requirements.

The Company must record a problem statement or provide a statement of requirement specifying what the customers related business activity requirements are. This must be recognized as a controlled business record. To assist a customer in producing a statement of requirements, the Company must develop standards and check lists against which can be recorded the available details and data. These standards must be used for preparing the customer's contribution and problem statement against which to make recommendations and for which customer-related business activity can proceed on an informed and agreed basis.

Sub-Clause 8.2.4 of BMS75k addresses the issue of Customer Use, Lifecycle, Support, and Provision. Customer-related business activities which require the Company to supply goods or services must be supported by the Company for the duration of the known application. The Company must establish the criteria for the expected period of use and the support required for the envisaged period on the goods and services provided. This support must be suitable and enough for the intended use and period of use by known customers and end users.

The Company must identify the possibility of risks associated with goods and service obsolescence and plan for the eventuality as part of its risk management practice. There must be an acknowledgment in the business activity of the obligation to customers which can be compromised by a decision to make goods or services obsolete, and this must be anticipated from a risk prospective. Notification from marketing, design, or purchasing that goods or services must be phased out or must cease to be available from a particular date, must be reviewed and all affected customers and authorities notified. This information must be recorded and recognized as a controlled business record**.**

Contractual obligations to which the Company is committed must be reviewed and assessed upon notification, or the possibility of obsolescence becomes a concern. Obsolescence control and retirement of goods or services at the end of their life cycle must be considered using both external and internal applications as appropriate. During the obsolescence plan implementation, support is given to the parallel operations of the old and new goods with stocks and manufacturing availability. These ensure the conduct for a smooth transition to the replacement goods and services, proceeds under controlled and planned conditions.

When the activity involves goods and services being phased out and replaced, the arrangements required must be reviewed and managed. The retirement must be agreed upon or requested by the customer which can be in response to a proposal or recommendation. Provision for the cessation of full or partial arrangements to stock and support after a certain period must be fulfilled. A plan to remove goods or service availability can be actioned and implemented once agreed with all stakeholders including contracted and involved parties.

A retirement plan to remove active support by the Company must be available when required. This retirement planning must include, where applicable, input from all authorities and known users and address the following items:

    a)   Cessation of full or partial support after a certain period.
    b)   Archiving of the goods or service records and documentation.
    c)   Responsibility for any future residual support issues.
    d)   Transition to the new goods or service, if applicable.
    e)   Accessibility of archive copies of documents and data.

Once the plan has been developed it must be authorized and approved by the relevant authorities before actioning as a controlled business record.

Sub-Clause 8.2.5 of BMS75k promotes the need for good customer communication and requires us to determine and provide within each customer-related business activity, effective arrangements for communicating with customers concerning goods or service information. This includes inquiries, contracts, requirement changes, order handling, and customer feedback, as well as customer complaints all of which need to be the subject of a documented business practice.

Complaints and feedback relating to a customer-related business activity must be reviewed and assessed for any contribution to business improvement including goods and service improvements. Complaints and feedback relating to the quality of the management or business conduct must be recorded and reviewed as a controlled business record for contribution to the Business Management System improvements and the Company's obligations to stakeholders. All customer communications in which a complaint, commendation, or statement of perception is identified must be recorded and recognized as a controlled business record.

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2.0   The EFQM Model Execution.
Criterion 4:   Creating Sustainable Value
4.1 Design the Value & How it is Created Continued.

Clause 8.3 in BMS75k discusses a solution for how to design the value and how we create it, under the requirements for Research and Development. This clause and its contents are core to achieving a solution in the creative innovative aspects of our business activities. The clause is extensive, but it provides for a discipline of research and development management which normally escapes such impositions. It consists of:

8.3	**Research and Development Business Activities**
8.3.1	**Research Business Activities**
8.3.2	**Development Business Activities**
8.3.3	**Research and Development Planning**
8.3.3.1	**Research and Development Authorization**
8.3.3.2	**Research and Development Project Plan**
8.3.3.3	**Commercialization Strategy**
8.3.4	**Research and Development Projects**
8.3.5	**Research and Development Inputs**
8.3.6	**Research and Development Outputs**
8.3.7	**Research and Development Results and Records**
8.3.8	**Research and Development Assessment**
8.3.9	**Research and Development Accountability**

When research and development are identified within the Strategic Business Plan, as a principal business activity, the requirements and objectives for research and development must be anticipated, assessed, accommodated, analyzed, and accounted for under the Company orientation, its technology, range of goods and services and the experience of the assigned research and development authorities at its disposal.

When applicable the Company must document the research and development business practices to include the research and evaluation of innovative and new developments as well as the replacements for current goods and services provided by the Company and the requirement for new goods and services developments required to realize the sales and marketing objectives.

Sub-Clause 8.3.1 in BMS75k concerns itself with the solution of Research Business Activities to be recognized as an innovative business activity with the freedom to explore new options but directed by the strategic orientation of the Company. Research is required to enquire into current and changing business circumstances and interests whilst maintaining a watch and brief on existing product and service applications in the changing markets and variable stakeholder interests. This research and development business activities include:

a)   Maintaining a register of research activities and interests,
b)   Management of the observation schedule and program,
c)   Needs exploring, identification, and evaluations,
d)   Problem and opportunity identification and recognition,
e)   Best solution scenario with an assessment of options and alternatives,
f)   Stakeholder preferences identification and analysis,
g)   Potential market identification and analysis
h)   Filtering needs and solution priorities
i)   Detailing development specifications

The research activity must identify with the 5As convention of anticipate, assess, accommodate, analysis and account and concentrate on the anticipation and assessment of needs and opportunities available that align with the Company's strategic interest and activities. The product of each research program and activity is a development specification which is required to translate an identified problem into a statement of needs and contain sufficient detail for development business activities to commence.

The information available must have to be screened and evaluated for development by the assigned research and development authority before committing to a specification for development. The process and product from a research project are a subject covered in the documented business practice and the development specification must be recognized as a controlled business record.

Sub-Clause 8.3.2 in BMS75k commends the solution found in Development Business Activities which directs us to establish, implement and maintain a high-level design development business activity as a progression from research work, but specifically tasked with technical evaluation and assessment of options and solutions in response to the needs identified by research business activities. Development business activities are accountable for all prescriptions and projects handed over from research or referred for development from other assigned authorities. Once the input to development has been screened, it is assessed and confirmed as suitable for development work to commence.

The development process and sequence are also specified under this clause and include the producibility and testability of each option in the evaluation of each solution that is suitable, designable, producible, and measurable to address the needs the research has identified. Consideration is given to the attributes, advantages, and disadvantages of each option identified as a suitable solution. Development seeks to balance general requirements with specific requirements in this evaluation and requires validating the concepts chosen through screening against the defined needs criteria and including the following considerations:

a)   Intellectual property considerations,   (Such as parents, infringements, jurisdiction, or sovereignty)
b)   Statutory and legislative requirements   (Local, domicile, and global)
c)   Reimbursement   (Sources of funding and recovery of development costs)
d)   Business Models   (Solution characteristics in each available model)
e)   Prototyping   (Identify the Questions or Issues to be Addressed)

Particular attention is given to information gathered through prototyping, which must affect the overall feasibility of a concept.

The additional information gathered through the considerations listed above (as well as other steps in the development process) is directed toward the detailed user and design requirement specification for the solution selected.

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   4.1 Design the Value & How it is Created Continued.

Sub-Clause 8.3.3 in BMS75k provides us with further solutions for designing value and its creation which is found in the Planning of the Research and Development Activities. This directs the Company to the contents of the Strategic Business Plan which must contain a description and provision for the Company to gain knowledge to design, develop, and enhance the Company's business activities including its products, services, technologies, and processes. This provision must be recognized as the authority to devise and conduct individual research or development projects as business activities.

All prospective research and development business activities are registered and authorized for which a plan and prescription must be determined and recognized as a controlled business record consisting of:

   Part 1   Research and Development Authorization
   Part 2   Research and Development Project Plan
   Part 3   Commercialization Strategy.

The authorization section of the Research and Development Plan will consist of:

   a)   Project Reference Numbers and Unique Identity
   b)   Title and description of the project
   c)   Principle consideration or concern
   d)   Identification of the relevant subjects in the Strategic Business Plan.
   e)   Relationship with the strategic business goals and objectives
   f)   Provision for authorized signatures and approval date

The project plan section of the Research and Development Plan can consist of:

   g)   Itemized list of project activities and objectives for each listed item
   h)   Time scales and milestones program
   i)   Provision for mark-up and sign-off by participating and verifying authorities
   j)   Resource requirements and Key collaborators
   k)   Team and Experience Requirements
   l)   Costs and estimates

In addition to the above consideration should be given, to documenting additional information within the project plan section. This can include:

   m)   Expected outcome(s).
   n)   Roles and responsibilities of the team members involved.
   o)   Time required for each activity.
   p)   Practices or methods to be employed.
   q)   Technological uncertainties and risk mitigation strategies for each task.
   r)   Regulatory approvals.
   s)   Intellectual Property (e.g., copyrights, trademarks, patents, industrial design rights, trade secrets).

Sub-Clause 8.3.3.3 in BMS75k directs the Commercialization Strategy which is core to how the Company can Design the Value and How we Create it. Each research and development project contains a detailed and practical commercialization strategy, comprising a defined plan on how the resulting product, process, or service must be introduced to the marketplace and how revenue must be generated. This includes how the commercial outcome of the project must be promoted, distributed, and sold. The commercialization strategy must include but not be limited to:

   a)   the need for this product, process, or service.
   b)   the size of the market and the targeted niche within the market.
   c)   known competitors and competing products, processes, or services.
   d)   major challenges for market penetration.
   e)   team and collaborators' commercialization expertise and know-how.
   f)   independent market assessments if available;
   g)   the value proposition that resulting products must deliver to the end customer.
   h)   how the resulting products must achieve competitive advantage in the marketplace.

When applicable a detailed breakdown of anticipated sales and market projections by product and customer must be included in the plan.

Sub-Clause 8.3.4 in BMS75k highlights the use of Research and Development Projects in finding solutions to how the Company should design value and how to create it. Projects for research and development must be registered and authorized for which a plan and prescription must be determined and approved. These should include the research and evaluation of innovative and new developments, replacements for current goods and services, and the planned development of new goods and services required to realize the sales and marketing objectives. The type of project must be identified from one of four recognized classifications:

   a)   Pure Business Research consists of experiments and speculative business work authorized for acquiring new knowledge without long-term benefits focused principally on acquiring business knowledge or know-how.
   b)   Strategic Business Research is directed into specified areas to explore useful discoveries and provide a broad base of knowledge necessary for developing a solution to recognized practical problems.
   c)   Applied Business Research for a specific application to determine uses for the findings of basic research or to determine new ways of achieving some specific and predetermined objectives.
   d)   Experimental Business Development to extend knowledge gained from research or business experience to create new business activities or improved goods and practices.

The Company must determine a research and development documented practice to define the levels and scope of authorization required for each of the above research and development project categories.

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4.1 Design the Value & How it is Created Continued.

Sub-Clause 8.3.5 in BMS75k provides the solution for values design and creation by directing what is required as inputs to research and development and requires inputs to the Business Research Activity to be documented with sufficient detail needed to convey the tasks required by the strategic orientation of the Company.

Research inputs required to enquire into current and changing business circumstances and interests, must be defined, and reviewed for adequacy by the issuing and receiving assigned authorities. Research inputs relating to existing goods and service applications are configured to the product and service current documentation.

Research inputs must be sufficient in detail and subject for a problem to be understood, identified, actionable and productive. It must be sufficient in detail for an accepted research project to commence and result in a statement of needs and contain sufficient detail for development business activities to commence.

The Development Specification must be screened and evaluated by the assigned authority within a record or register before committing to development work and recognized as a controlled business record.

Sub-Clause 8.3.6 in BMS75k provides the solution on what is required as an output from research and development to promote values design and creation which consists of a completed research and development plan and prescription. The following information must be included or referred to as a product or result of the development of business activities:

a)   Research and development project review records
b)   Scope, range, and results of the research and development work completed to date
c)   Commercialization Strategy/ Rational/Market Requirements
d)   Other important financial data and considerations that need to be communicated

When applicable, a design and selection prescription must be provided by the development business activity consisting of the detailed specification for the design and selection business activity to be undertaken. This prescription shall contain as a minimum:

e)   Scope and description of design and selection work requirements and disciplines
f)   Known Statutory and Legislative Considerations
g)   Experience from similar development projects
h)   Pass Fail Criteria (Test and Inspection Expected Results)
i)   Metrics for test and inspection equipment and resources
j)   Requirements for any special processes
k)   Base line configurations relative to existing products
l)   Outline and references for master records index
m)   Nominations for manufacturing solutions
n)   Identification of specialist skills and techniques
o)   Make or buy considerations
p)   Requirements for high-level assemblies' hierarchy
q)   Critical component details and nominations
r)   Preservation and packaging considerations
s)   Requirements for user documentation and manuals
t)   Design and selection program and time scales
u)   Other design and selection considerations

The above documents provide for verification that the products and services produced must meet the research and development statement of needs and other documented requirements. The design and selection prescription contains a list of critical aspects of the development that if changed, would invalidate the test results and necessitate a re-test. This consists of a record of key characteristics, and specific actions to be taken to consistently produce the same aspect of the product and service as a controlled business record.

> ***Note:***   *Design disciplines can consist of a dedicated design function such as IT, Electrical, Mechanical, Cosmetic, Fabric, and similar vocations or collectively such as Production, Logistic, Process, Publicity, or Distribution.*

Sub-Clause 8.3.7 in BMS75k provides a specification and solution on what is required by way of results and records on research and development business activities to direct values design and creation. All records produced by the research and development business activities and projects are determined and recognized as a controlled business records. As a minimum, these consist of:

a)   Register of research activities and interests
b)   Development specification
c)   Research and development project plan
d)   Research and development project review records
e)   Design and selection of prescriptions
f)   Research and development assessment record

Each of the above records is identified and traceable to an authority responsible for its review and approval for subsequent use and retention as a business record. All documents are identified and controlled under the company's documented configuration control practices.

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Sub-Clause 8.3.8 in BMS75k provides the solution on how to assess the product from research and development which effectively consummates the design of value and how we create it. We must establish, implement, and maintain a documented practice for the assessment of the research and development activities and projects to measure the effectiveness of the business activities and their contribution to the Strategic Business Plan.

Research and development assessments can be incorporated into the assessment of goods and services or a separate analysis and review of the research and development business activity itself. The review must use available data for the goods and services it produces or provides as well as research and development records derived from individual projects. They can also be used to manage the goods and services and decisions needed during each phase of a life cycle.

The aspects and applications of the goods and services are assessed, analyzed, and reviewed as part of the research and development program. They must be assessed at planned intervals to improve the goods and service success during each of the phases of their life cycle

(development -introduction – growth – maturity – decline).

As part of each assessment or review, the Company must demonstrate through documented knowledge of the goods and services provided:

a) An understanding of how the goods or service works within known applications,
b) The resources, including know-how, needed for the continued production or delivery of the goods or service
c) The resources and arrangements needed for the in-service support of the goods and services
d) Obligations and commitments for suitable arrangements to provide for the replacement of obsolete items.
e) The legal and statutory requirements applicable to the production, sale, and use.
f) Protection and provision for recourse against counterfeit goods and services.

In addition to the above the research and development assessment and review considers all identified or foreseeable product or process risks and their consequences, including as appropriate to the Company and the business activities:

g) Assignment of responsibilities for research and development management
h) Characteristics and attributes of the current product range
i) Assessment, conveyance, and communication of research and development concerns to managers and staff
j) Management of actions required to realize the directives from research and development business activities
k) Accommodations for new products and processes in the technology and orientation of the Company.

The assessment of research and development is recorded as a controlled business record.

Sub-Clause 8.3.9 in BMS75k provides the solution to research and development accountability activities, results, and information produced which must be traceable to an assigned authority. The Company must ensure that all decisions reached, and all research and development conclusions used are traceable to the assigned authorities tasked with the decisions made and the information used to make such decisions so that the decisions made are defendable at all times.

Measures must be applied in a documented practice to ensure decisions reached and acted upon within the business activities of the Company are always defendable and traceable to information and the occasion in which the decision was formed and can be proven to be sound and correct at a later stage. All decisions are reached because of information provided or used in a research and development business activity. These must be recorded and recognized as a controlled business records.

Clause 8.4 in BMS75k addresses the solutions in the Design and Selection of Business Activities which provide for designing the value and how to produce it. When design and selection are identified within the Strategic Business Plan, as a principal business activity, the Company is required to document the design and selection business practices to include requirements and objectives for design and selection. The Company must anticipate, assess, accommodate, analyze, and account for the design and selection of business activity under the company technology, goods, and service range.

A receiving, reviewing, and processing design work practice must be instigated by the research and development business activity to accommodate stewardship of the current goods and service ranges provided. Stewardship of the Company designs includes administration of the document and data configuration with the Company products and services which is defined in a Master Index Register containing the current base line release and current build standards of the Company product and service documentation. **Clause 8.4** of BMS75k covers the Design and Selection of Business Activities which is discussed in the following subclauses:

8.4.1   Design Business Activities
8.4.2   Selection of Business Activities
8.4.3   Design and Selection Planning
8.4.4   Design and Selection Inputs
8.4.4.1 Design Information Input
8.4.4.2 Selection Information Input
8.4.5   Design and Selection Outputs
8.4.5.1 Output and Product of Design Business Activities
8.4.5.2 Output and Subject of Selection Business Activities
8.4.6   Design and Selection Results, Records, and Changes
8.4.6.1 Design and Selection Business Activity Verification
8.4.6.2 Design and Selection Business Activity Validation
8.4.6.3 Design and Selection Verification and Validation Testing
8.4.6.4 Design and Development Verification and Validation Documentation
8.4.6.5 Control of Design and Selection Changes
8.4.6.6 Sub-tier Design Management and Configuration
8.4.6.7 Design and Selection Subcontractor Management and Configuration
8.4.7   Design and Selection Assessment
8.4.8   Design and Selection Accountability

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Clause 8.4.1 in BMS75k introduces the design of business activities when the design is identified within the Strategic Business Plan and provides a solution for value design and creation. The Company is required to establish maintain and operate an effective design business activity to convert developments into producible, verifiable, and selectable products and services for which design business activities must be defined and communicated in a documented practice.

Clause 8.4.2 in BMS75k introduces the business activity involved in the selection and directs the Company to establish maintain and operate an effective selection business activity to convert internal and customer specifications and duties into proposals for products and services.

The Company is directed to integrate into each selection decision, a piece of knowledge and responsibility for the goods or service safety and environmental impacts, created or envisaged because of the business activity. This includes safe and responsible arrangements for a period of expected use, migration, and disposal of the products or services after use, all of which must be defined and communicated in a documented practice.

Clause 8.4.3 in BMS75k introduces the need for Design and Selection Planning and requires the Company to administer the design and selection of goods and services offered to customers or provided in connection with internal business activity. Selections and recommendations for products or services offered by the Company against each known requirement needs planning where a duty or application is provided by the customer. Typically a design and selection plan consists of:

    a)   Itemized list of design activities and objectives for each listed item
    b)   Resource requirements and allocations
    c)   Design and selection team allocations
    d)   Provision for Make or Buy considerations
    e)   External design and selection contributions
    f)   Costs and estimates

In addition to the above, consideration and provision within each design and selection plan must be made to document additional information which can include:

    g)   Availability of information to commence each task
    h)   Criteria required to verify completion of each task
    i)   Roles and responsibilities of the team members involved
    j)   Time and finance required for each activity
    k)   Practices, methods, or know-how to be employed or acquired
    l)   Technological uncertainties and risk mitigation strategies for each task
    m)   Stages identified for regulatory, customer, or 3rd party approvals and validations
    n)   Intellectual property considerations

The Company must assign the design and selection of business activity to distinct disciplines and, for each activity, define the tasks, necessary resources, responsibilities, design competences, input and output data, and planning issues or constraints. For each design and selection business activity we consider the ability to produce, inspect, test, and maintain the goods or services being selected or designed.

The different design and selection tasks to be carried out within each business activity are based on the safety and functional objectives as well as the attributes and advantages of the goods or service being selected under the Strategic Business Plan as well as customer, statutory and regulatory requirements.

The Company must manage the interfaces between different and distinct disciplines and groups involved in the design and selection of business activity to ensure effective communication and clear assignment of responsibility is achieved. Planning output must be updated, as the design and selection business activity progress or changes are required.

Accountability for design and selection activities, results, and decisions must be determined and recorded to ensure all matters are traceable to the authorities tasked with the decisions made and that decisions made are always defendable and traceable to the records and information available at the time of a decision, and on which decisions were reached.

Note 1:   *Intellectual property can include Company ownership of copyrights, trademarks, patents, industrial design rights, trade secrets, and indigenous property as well as the need to obtain consent or license from external providers or authorities who hold the property to such rights.*

Note 2:   *Distinct disciplines can consist of a dedicated design function such as IT, Electrical, Mechanical, Cosmetic, Fabric, and similar vocations or collectively such as Production, Logistic, Process, Publicity, or Distribution.*

The remainder of clause 8.4 of BMS75k describes the requirements for inputs and outputs to and from design and selection business activities which follow the same requirements and logic set down for research and development.

The product or outputs of the design business activity must be identified with a defined base line release for its initial build standard. This should be verified and approved before its incorporation and registration within the master records index configuration control records of the Company products.

Only after verification can any product from the design business activity be registered as complete and its base line release recorded as the build standard in the master index register.

The base line release, build standard, and master index register must all be recognized as controlled business records.

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Criterion 4:   Creating Sustainable Value
4.1 Design the Value & How it is Created Continued.

Clause 8.5 in BMS75k introduces the subject of the Purchasing Business Activities which is a consideration when designing value and how it is created. The "Make or Buy" decision plays a major part in defining both policy and process in business matters and issues. Design is significantly improved when it is not constrained by internal boundaries and can incorporate supplier capacity and know-how in its considerations and selection.

To this end, the Company is required to conduct a purchasing and sub-contracting business activity in a timely fashion under the correct documented practices. Purchasing business activities must only commence after the make or buy decision and be conducted under controlled conditions to provide for the requirements of the business activities which the Company deems appropriate to purchase or sub-contract. Controlled conditions include consideration of:

- a)   Associated risk assessments
- b)   Cost and value to the Company of purchase
- c)   Timeliness and program
- d)   The totality of the problem solution and transfer of ownership
- e)   Acquisition or loss of expertise and know-how

Requirements for purchased goods and services must be specified and communicated to the suppliers, and the receiving authority, in sufficient detail, so that those responsible for providing and receiving the goods, or taking delivery of the services, can verify that they are correct and under the requirements specified. The scope and degree of controls employed are directed by the contribution the purchased goods and services have on the outcome of the business activities involved.

The Company is responsible for the conformity of all goods and services purchased or sub-contracted services acquired, irrespective of customer or other external authority instruction or requirements. The purchasing process must be detailed and applied through a documented practice that contains instruction and guidance on quantifying, programming, qualifying, and pricing all Company purchased requirements as well as the practices required for selection and control of suppliers and providers of services.

The Company must ensure that business decisions made concerning all purchasing matters are defendable at all times, suitably recorded, and recognized as a controlled business record. Specification of requirements for the products and services purchased must include the use of the following methods for determining the quality required:

- f)   National or internationally recognized standards
- g)   Brand or manufacture
- h)   Representative sample
- i)   Specification of duty
- j)   Market grade
- k)   Other acceptable independent determinable methods

Purchase documents released to the supplier or contracts agreed between the Company and a supplier which convey the requirements must be subject to document and configuration controls. They should be reviewed before release or application and must contain as appropriate to the goods and services purchased:

- l)   Authorization and criteria for release when goods or services are received,
- m)   Practices, processes, and equipment to be used or applied,
- n)   Know-how or competence of personnel involved in the completion of the requirements,
- o)   Business Management System application and requirements,
- p)   Identification and revision status of all documents specified, referenced, or applied,
- q)   Relative inspection and verification instructions with any applied technical data,
- r)   Design, test, examination, inspection, and verification requirements (including service or process verification),
- s)   Use of statistical techniques for acceptance, and related instructions,
- t)   Requirements for test specimens or trials by which the goods or service is to be verified and validated,
- u)   Production or delivery methods and conventions,
- v)   Relative storage conditions and special handling requirements
- w)   Design approval, inspection/verification, investigation, or auditing stipulations,
- x)   Contribution required to and references to be taken from the master records index and build standards.

Supplier selection must be informed and only undertaken by the assigned authorities based on available information as to a supplier's past performance, qualification, experience, or acquired knowledge. The Company must define and implement controls in a documented practice for the selection of suppliers and define the scope of decisions each assigned authority has in the supplier selection process. Such decisions must be informed and traceable to information available at the time that relates to the supplier's ability to comply with instructions and meet specified requirements for quantity, quality delivery, and price.

The Company can use data from objective and reliable external sources, to support and verify the supplier selection decisions including:

- y)   Information from a supplier's accredited management systems,
- z)   Process and service nationally recognized certification bodies,
- aa) 3rd and 2nd party management system approvals,
- bb) License or equivalent government authority,
- cc) Awards and commendations,
- dd) Conformance to international and globally recognized standards
- ee) Performance against trial orders and simulated conditions
- ff)   1st off inspection results or an equivalent product verification practice
- gg) Commercial independent assessments

When no records of a supplier's past performance, qualification, experience, or acquired knowledge can be identified to support the selection decision, then the basis on which the decision has been made should be reported and verified by a higher assigned authority or the Business Management Representative.

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Clause 8.6 in BMS75k directs the Company to consider the business goods and service processes when creating sustainable value and how the Company designs the value and selects the best methods of product manufacture or service delivery. The goods and services produced because of the business activity and the processes involved must be planned and controlled. Planning of the goods and service processes business activity must be the subject of a documented practice and consistent with the requirements of the other processes of the Business Management System that contribute to the Strategic Business Plan. Here the Company is required to plan the production and service provision business activity by the use of documented practices or their equivalent. Production, manufacturing, distribution of products, or delivery of services must be controlled by effectively operating and verifying the practices document at nominated stages. These practices include where applicable:

a)   Instruction and information that describes the tasks to be completed,
b)   Instruction and information that describes the goods to be produced or delivery of services,
c)   Provision and use of the correct equipment by use of informed instruction,
d)   Monitoring and measuring the effectiveness of methods and processes used,
e)   Internal and external verification activities and resources,
f)   Measurement instructions, plans, and records,
g)   Criteria for process or service continuation or adjustments,
h)   Directives for release, delivery, and support in the use and operation of the goods and services provided,
i)   Accountability for business goods and services during production, deployment, distribution, and disposal,
j)   Removal of foreign objects and action required to prevent contamination or deterioration of goods or services,
k)   Utility and consumables monitoring and control,
l)   Standards of workmanship and prescribed levels of quality
m)   Critical process aspect control, which is necessary for the correctness of the goods or services being produced,
n)   Variable data know-how and analysis are required to identify and measure deviations,
o)   In-process inspection and testing when final checks cannot be used to verify goods or service correctness,
p)   Any special processes deemed worthy of additional or specific monitoring, recording, adjustments, and controls,

The design and provision of quality plans must be a contributing document to the base line release and master records index for the products and services provided. Quality plans and the results recorded are recognized as a controlled business record.

> **Note:**   *The use of process, goods, and service business quality plans in connection with the control of goods and service provision is highly recommended. These are consistent with the requirements of the other processes of the Business Management System and its contribution to the Strategic Business Plan.*

The Company must establish, implement, and maintain instructions and a documented practice to identify the safety and environmental impact of its business activities. This includes the production of the goods and service delivery within its operations as defined in the scope of the Strategic Business Plan together with those aspects of the business operation over which the Company has control or influence. All processes used in the production and manufacture of the goods or deployment of services must be assessed for their safety and environmental impact. The assessment must be repeated at planned intervals and accommodated within the Business Program. This can then be matched and reviewed at planned intervals against the current legislative and statuary requirements applicable to the tasks involved. Records are required for the assessments and reviews and are recognized as controlled business records.

The Company must define and implement controls in a documented practice for the validation of the processes it uses in any business activity when subsequent inspection and testing of products produced or services deployed cannot verify the correctness of the processes involved at a latter stage. This must demonstrate that the selected technology and methodology can produce the quality of goods and services specified. The documented practice defines the scope of decisions each assigned authority has in the process selection, deployment, and verification including the process capability and the need to maintain records of samples and representative items from the initial production or provision of a new part, product, process, or service. When the Company relies on the results of the initial process validation samples for the release of subsequent goods and the delivery of services, the processes used must be controlled within specified limits to assure the correctness of the goods and services being produced. Planned and regular comparisons with the agreed sample must be recorded and the record recognized as a controlled business record.

The master records index or its equivalent should contain a list of critical aspects of the goods or service that if changed, would invalidate the test results, and necessitate a new sample or re-test. This list must consist of data on key characteristics, and specific actions to be taken to consistently produce the same quality of goods or services.

When a change invalidates or exceeds the limits set, the process validation practice must be repeated, and action taken to ensure the configuration control of the goods or services involved is clearly and positively identified or traceable to each change introduced. Records must be maintained of the assessments and reviews of process validation results and must be recognized as a controlled business record. The build standard established for the goods or services being released must contain or refer to all documents and records needed to provide for verification of the goods and services produced to the design and selection specifications. When changes to the goods are required, a change request record must be raised which contains:

q)   Description of the changes and the actions required
r)   Timing and effective date of the changes coming into effect
s)   Accounting and disposition of existing goods in process, stored, distributed, or in use
t)   Authorities responsible for authorizing the changes and those authorities tasked with servicing them
u)   Reference to the information on which the change decision is made,

The results of changes to the goods and services must be assessed before the decision to approve or authorize a change. This is required to confirm that the desired effect has been achieved without adverse effects on goods or service quality and conformity. Records are required of all decisions relative to changes and results and are recognized as a controlled business records. Personnel authorized to approve changes to manufacturing processes or deployment of services must be identified as assigned authorities.

The Company must control and document all aspects affecting changes in service content and deployment, processes, production equipment, tools, or software programs. Process changes must be identified in the goods or service configuration even if dimensional or specifications remain unchanged. The master records index or its equivalent contains a list of critical aspects of the goods and services that if changed, would invalidate the test results and necessitate a new sample, re-test, or assessment.

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2.0   The EFQM Model Execution.
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4.1 Design the Value & How it is Created Continued.

Sub-Clause 8.6.1 of BMS75k directs the Company to consider the Control of Process Changes on goods or services released to the same specification but produced or delivered from differing processes. These must be identified as such and released under separate and identifiable configurations, traceable to the specification, build standard, and process route or passage used. This must be applied when differences are incurred because of:

a)   Variations in the process plans or prescriptions,
b)   Variations in the known applications or use,
c)   Variations in the design criteria or development,
d)   Variation in suppliers, subcontractors, materials, or consumables,
e)   Different plant, machinery, or equipment has been used,
f)   Variation in process timings, sequence, routes, or schedules,
g)   Changes in software, firmware, technology, or hardware,
h)   Changes in test methods or acceptance criteria,
i)   Variations in inspection, testing, and control methods or equipment,
j)   Differences in the application of management practices or standards,

When business activity variations or changes are applied, the criteria for the use of previous testing and inspection results must be considered for compliance. Appropriate action must then be taken when such tests are deemed to be compromised or not relative. The results of business activity change in production processes and delivery of service must be assessed and recorded to confirm that the desired effect has been achieved without adverse effects on goods or service conformity with the specified requirements and recognized as a controlled business record.

When the Company and its business activities are dependent on equipment, tools, software, and IT programs for the automation and control or measurement of its goods, processes, and services, such equipment must be proven before use to demonstrate its suitability, capability, and correctness for the specified tasks involved. Records of the equipment proving, and validation must be maintained and recognized as a controlled business record.

The Company must validate production equipment, tools, and software programs used to automate, control, or monitor processes and service correctness before its deployment.

Storage requirements for such equipment, including periodic checks on the afforded preservation and condition, must be maintained. A documented practice is required to define the arrangements required for equipment or tooling in storage for prolonged periods or which are susceptible to requiring regular adjustments during inactivity or infrequent use.

The Company must determine the monitoring and measurement to be undertaken and the monitoring and measuring devices needed to provide evidence of conformity of goods or services to specified requirements. A register of all monitoring and measuring equipment must be maintained in which the process employed for calibration, verification, and adjustment can be recorded.

This applies to test software, firmware, or hardware used to produce data. When used in the monitoring and measurement of specified requirements, the ability of computer software to satisfy the intended application must be proven before use, confirmed and the results recorded. This must be undertaken before initial use and reconfirmed as necessary the records of which are to be recognized as a controlled business record.

The Company must establish processes to ensure that monitoring and measurement of the business activities can be carried out and are carried out in a manner that is consistent and representative of the current goods or services being provided.

Monitoring and measurement requirements must be indicative of current business activities including the relevance of the samples taken, with the current goods and services being sold, and the environmental conditions under which they are being used or deployed.

The Company must establish, implement, and maintain business activities and processes for the recall of monitoring and measuring equipment requiring calibration or verification.

The Company must assess and record the validity of the previous measuring results when the equipment or the practices used are found not to conform to requirements so appropriate action on the equipment and any goods or other business activities affected can be taken. When the goods or service provided by the Company is in use, provisions for user support must be available as applicable for the following:

k)   Collection and analysis of in-service data
l)   Action to be taken, including investigation and reporting, when problems are detected after delivery
m)   Control and updating of technical documentation
n)   Approval, control, and use of repair schemes, and
o)   Controls required for off-site work (e.g., Company's work undertaken at the customer's facilities.)

Post-delivery support includes appropriate after-sales services to provide for the continued use of the products or services purchased during the expected life of the products or services involved.

This should include the capacity to fulfill the obligation of the Company in respect of a guarantee, warranty, upgrade or repair commitments and provide for the ongoing relationship with the customers and end users throughout the life cycle of the product or service, while other warranties are under time constraints.

Post-delivery support must encompass all services that assist a customer in using the Company product or services supplied correctly and ensure continued customer satisfaction.

The Company's business activities must provide facilities whereby customers can return goods or access facilities for safe disposal after the use of all goods and services provided.

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4.1 Design the Value & How it is Created Continued.

Sub-Clause 8.6.2 of BMS75k directs the Company to consider the Validation of Processes and Service Provision when Creating Sustainable Value and the Design of Value and how to create it. The Company's business activities must validate any process used for production and service provision where the resulting output cannot be verified by subsequent monitoring, measurement, or tests. This includes any processes where deficiencies become apparent after the goods are in use or the service has been deployed. Business activities validation must demonstrate the ability of these processes to achieve planned results. The Company must establish arrangements for these processes including, as applicable:

    a)   Defined criteria for review and approval of the processes,
    b)   Approval of equipment and qualification of personnel,
    c)   Use of specific methods and practices,
    d)   Requirements for records and
    e)   Criteria and practices for revalidation.

The Company's business activities determine those characteristics in the goods or services provided that are significant or key to the use or application by the customers or users. These characteristics must be monitored and controlled to ensure variations in their duty or dimensions are within acceptable specified limits. Variations management activities must be performed on the characteristics identified until business activities are in control and process capability has been established. A process and service validation practice must be documented and applied in a documented practice to ensure the business activities:

    f)   Understand the characteristics and the required performance
    g)   Adopt a process that must produce acceptable performance
    h)   Operate the process to generate data
    i)   Analyze data to identify appropriate action
    j)   Take action from the study (operate, redesign, and improve)
    k)   Continue to monitor the business activities' performance
    l)   Determine if changes or adjustments are required

The business activity must provide for all matters and issues identified and reported which require action to ensure specified or planned results and outcomes are achieved. The Company's business activities must identify and maintain appropriate records and documentation of the goods or service characteristics and manage the process elements that influence variations from the required specifications. Records must be maintained of all decisions relative to the validation of process and service provision and be recognized as a controlled business record.

> *Note: Provisions are made to permit the planned and specified requirements to be redefined and communicated as part of the improvement process and business activities. Appropriate changes to the relevant business plans are considered when agreed upon as necessary or unavoidable.*

Sub-Clause 8.6.3 of BMS75k is dedicated to the subject of Identification and Traceability and requires the Company to make provision for the identification and traceability of the goods or service provided in a documented practice which includes instruction for identification and tractability practices, changes, integrity, provenance, product and service obsolescence and substitution.

Identification and traceability must be achieved by suitable means, sufficient to determine the origin and date of manufacture or service delivery for which records must be completed and retained. This includes the identification of the configuration of the goods or services to identify any differences between the actual configuration and the configuration recorded.

Company business activities must control the unique identification of the goods or services provided by complying with the documented configuration practices and maintaining records which include the status concerning monitoring and measurement requirements before and after delivery.

Traceability and identification must be supportive of the Company configuration practices and not conflict with any of its provisions. Where appropriate, the tractability requirements include:

    a)   Identification to be maintained throughout the specified life expectancy
    b)   The ability to trace all goods or services provided to the destination (e.g., delivery, discharge, or scrap).
    c)   Status and identification of parts or deployments

The Company must be capable of demonstrating its ability to trace the identification and deployment of goods and services to a given location or customer for a specified period not less than the life expectancy of the goods or service provided. Records must be maintained of all decisions relative to the identification and traceability of products and service provision and recognized as a controlled business record that greatly assists in the management of changes in products and services.

Change is an important consideration when Creating Sustainable Value and how the product and service value is created and maintained. The Company must have a documented practice for change control which is conducted in sequence commencing with a statement explaining the need for change supported by a change request. Changes in goods or service characteristics, configuration, or means of production or delivery must be planned controlled, and recorded. This control includes:

    d)   Documenting the change request.
    e)   Formal assessment.
    f)   Planning.
    g)   Monitoring and Measuring.
    h)   Implementation and Review.
    i)   Final assessment:

This is to ensure the authorities who have been party to the change and its applications are informed and conversant with its configuration, implementation, and associated controls. When changes in the goods or service characteristics, configuration, or means of production or deployment change, such changes must be recorded and made traceable to the date, time, or identification at which point the change was introduced or applied.

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4.1 Design the Value & How it is Created Continued.

Sub-Clause 8.6.3.2 of BMS75k addresses the difficult subject of Traceability, Integrity, and Provenance and requires the Company to ensure where appropriate, the goods and services are traceable to records that support their suitability for the duty specified. These traceable records must confirm the characteristics of the goods and services provided as being correct for the specified application.

Goods and service integrity must be assured to confirm the goods or service performance, or correctness records and the goods or services being provided and sold. This must be achieved by the identification of the relevant records that reflect the hierarchy of testing, inspection stages, measurement events, monitoring practice, or assessment of the suitability of the goods and services. The Company must ensure the integrity of the goods and services being provided are correct to the specified requirements, including outsourced or contracted items. Goods and service integrity needs to be assured and verifiable throughout the realization process and during service including safe disposal after use.

During change, the provenance of goods and services must be assured and identified to appropriate verification and validation records. These must be identifiable and apparent by the use of labels, idents, or records, which use idents, issues, revisions, and serialization to demonstrate the integrity of the goods and services is correct and traceable to the verification record and its results. Traceability, integrity, and provenance records must all be recognized as controlled business records.

Sub-Clause 8.6.3.3 of BMS75k addresses Obsolescence and Substitution, for which the Company must ensure as a business activity, that goods and service obsolescence is accommodated and planned under controlled conditions which include:

  a) Requirements analysis and definition of obsolescence.
  b) Identification and/or development of replacement goods.
  c) Conversion of existing goods and relative data.
  d) Obsolescence execution.
  e) Obsolescence verification.
  f) Support for the existing customers in the future.
  g) Statement of why the old goods are no longer to be supported.
  h) Description of the goods or service with its date of availability.
  i) Description of other options available, if any, once support for the old goods has been removed.

The Company must plan all aspects and incidents of obsolesces and substitution. The planning must identify and include all known users, requirements, and contractual obligations for the timely conversion of goods design and any related data. Consideration must also be given to the replacement goods execution, verification, and support for the old usage in the future. Parallel operations of the old and new replacement goods and service providers must be considered to include known users for a smooth transition to the new requirements. Training and support must also be provided where appropriate.

When goods are being phased out and replaced, the arrangements required must be reviewed and managed. All related goods should be retired at the request of the customer. Records must be maintained of all decisions relative to the obsolescence and substitution of process and service provision and recognized as a controlled business record.

Sub-Clause 8.6.4 of BMS75k directs the action for managing the Control of Work Transfer. The Company is required to establish, implement, and maintain a process in a documented practice to plan and control the temporary or permanent transfer of work (e.g., from one Company facility to another, from the company to a supplier, from one supplier to another supplier) and to verify the conformity of the work done or completed to specified requirements.

When the Company chooses to support the outsourcing of goods or services with materials or advice and data, the integrity of the support provided must be assured and documented. This must be applied and verified at the stages of release to the outsourced authority and the receipt by the Company following completion of the processes or services outsourced. Records must be maintained of all decisions relative to work transfers and recognized as a controlled business record.

Sub-Clause 8.6.5 of BMS75k relates to Customer Property and requires the Company to be a good steward of all customer property by determining and applying a documented practice to ensure its identification and ownership are suitably recorded and identified. Due consideration must be given by the Company as to the customer's instructions for the use, care, and disposition or disposal whilst under its stewardship. In the absence of such instruction, standards of accommodation, and logistical reasonability must be applied where applicable or when known and be evident from the accommodation awarded to such property. The Company must use identification and traceability business activity practices to segregate customer property from its own and other customer's property. This must be recorded and evident by providing for an account of its use and disposition from receipt, assignment through to consumption for the specified purpose.

Customer property can include customer-furnished data used to assist the production and/or inspection of the goods and verifications of services provided. The Company is responsible and accountable for the protection and integrity of customers' intellectual property. In all cases where customer property is entrusted to the Company, an assigned authority should be appointed to be responsible for the property. The authority must ensure it is monitored and controlled, identified as belonging to the customer in question, and only used for the agreed purposes for which it was supplied. If any customer property is lost, damaged, or otherwise found to be unsuitable for use, the Company must report and record this to the customer. Any surplus items or obsolete data must be returned to the customer or disposed of in an agreed fashion acceptable to all concerned parties. The following are recognized as customer property when entrusted to the Company's stewardship and control:

  a) Materials or data supplied for inclusion in a process or goods,
  b) Goods returned for correction or replacement
  c) Goods or information supplied for samples, repair or upgrading,
  d) Packaging and materials or advice supplied directly by the customer for logistical purposes,
  e) Customers gauges, tooling, computer programs, or aides
  f) Materials and goods handled during inquiries, operations, relocations, or temporary storage,
  g) Services supplied and funded by others to a customer's property whilst in the organization's charge,
  h) Intellectual property including specifications, software, firmware, and test prescriptions.

Records must be maintained of all decisions relative to the management and identification of customer property and recognized as a controlled business record.

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Sub-Clause 8.6.6 of BMS75k relates to the Prevention Against Counterfeit Goods and requires the Company to take action and implement the necessary precautions to prevent its activity and ultimately its customers, from introducing counterfeit, questionable or compromised goods, parts, or services into the marketplace or the production processes. Responsibility must be defined for the prevention of counterfeit products being incorporated or released as goods or services of the Company which includes:

a)   Documenting, implementing, and enforcing a counterfeit prevention policy,
b)   Document practices and practices which shall be effectively applied in respect of counterfeit goods and services,
c)   Adopt and implement the appropriate directives and requirements of industrial and trading standards for guidance as best practice.
d)   Review, and integrate the specified practices and requirements including directives into the documented management practices to ensure they are appropriate and effective.
e)   Actively cooperate with all stakeholders in the implementation of their policy to eliminate
     counterfeit components from all associated goods and services provided,
f)   Ensure appropriate records are maintained relative to components received and all applicable source data

A counterfeit goods and services control plan must be adopted and effectively applied which includes:

g)   Service and goods availability
h)   Purchasing and supplier management
i)   Purchasing information and contracts
j)   Verification of incoming goods and services
k)   Product configuration and documents
l)   product audits and investigation
m) Material Control

The plan should be documented and contain the documented practices that need to be followed to cover risk mitigation, disposition, and reporting of counterfeit goods.

This must ensure that the possible risk of counterfeit goods being received is identified and mitigated to the greatest possible extent to guard against subsequent release to a customer or end user. Records must be maintained of all decisions relative to counterfeit products and services, recognized as a controlled business record.

Sub-Clause 8.6.7 of BMS75k relates to the Preservation and Release of Goods and Services and instructs the Company to make provision for the necessary protection and stewardship of goods and services, irrespective of the stage of completion. This is to ensure the risk of damage or detriment is avoided during production and before delivery to the distributor, customer, or end user.

Before the release of products or services to a customer, the Company must ensure that all foreseeable precautions have been afforded to the product or service to protect and prevent damage as part of the business activities. This must be applied throughout the Business Activities, including any process outputs, during processing and delivery to the intended destination, to maintain conformity to requirements and include identification, handling, packaging, storage, and protection.

Preservation must also include process output because this constitutes parts of the goods or any physical process output that is needed for the provision of the service. The Company must ensure at appropriate stages in the production and delivery process, that goods and services conform to the agreed requirements.

Evidence of correctness must be maintained to ensure that goods and services are not released and do not proceed until the agreed or planned arrangements for verification of conformity have been satisfactorily completed, unless otherwise approved by a relevant authority and, where applicable, by the customer. Documented information and records must be maintained to indicate the person authorizing the release of goods and services for delivery to the customer.

Records must be maintained of all decisions relative to the preservation and release of products and services and recognized as a controlled business record.

Clause 8.7 of BMS75k directs us in the Control of Non-conforming Products and Services and requires the Company to prepare by a documented practice to identify and segregate non-conforming goods and services from other conforming work that is compliant with an agreed specified requirement.

Non-conforming goods or services must be segregated, identified, and contained in areas dedicated to accommodating them upon discovery or as soon thereafter as it is practical to do so. This provides for effective containment of all non-conforming goods and services whilst solutions are being considered and decisions are being made as to their correction or disposition.

A competent and informed assigned authority within the Company must be authorized to correct, re-service, or replace all non-conforming goods and sub-standard services with conforming work whenever possible and appropriate.

When the nonconforming goods or services are corrected, the Company must demonstrate that the required specification has been achieved before releasing it to the customer, distributor, or end user.

When such action is incommodious to the interests of the customer, the specified agreed requirements can be amended by agreement confirmed in permits or concessions to align with the availability of the goods and services produced. This also applies to nonconforming goods and services detected after delivery or during the provision of the service.

When the nonconforming goods and services have been delivered to the customer, the Company must also take appropriate action to assure that customer satisfaction is repaired and achieved. This must include appropriate segregation, containment, returning, and suspension of goods and services, and informing the stakeholders of the problems and the actions being taken.

Appropriate corrective actions must be introduced and taken at all stages in the resolution of the non-conforming product and services identified. Records describing the nature of nonconformities and any subsequent actions taken, including permissions obtained, must be maintained and recognized as a controlled business record.

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Criterion 4:   Creating Sustainable Value
4.1 Design the Value & How it is Created Continued.

Clause 8.8 of BMS75k requires the Company to consider all External Business Operational Influences, in addition to controlling internal operational Business Activities. It must consider all known External Business Operational Influences that can impact or create a need for change in the planned current and consistent Business Activities which are matched to achieve set Company objectives.

The Company must establish, implement, and maintain, in a documented practice, the activities required for determining and monitoring all identified or foreseeable external matters which advantage or detract from the planned business operations. The need for change or mitigation must then be considered for specific internal environment factors and attitudes which would directly affect the company's planned operations including:

- a)   Customer's requirement expectations, changes, and variations,
- b)   Suppliers' capacity variations and difficulties,
- c)   Employee requirements and expectations,
- d)   Competitor's activities and achievements,
- e)   Public preference, trends, and fashions,
- f)   Marketing techniques, campaigns, and promotions,
- g)   Media activities, intrusions, and adverse publicity,
- h)   Availability of information, experience, knowledge, skills, and advice,
- i)   Industrial action and disputes,
- j)   Surrounding infrastructure.

Consideration must be given to aggregate factors and influences which affect the Business Operation through the sector, area, or boundary in which the Company Business operates or is constrained, including, as appropriate:

- k)   National and International Statutory and Legislative Instruments
- l)   Political Domestic or Foreign Policy
- m)   Religious Orientation and Activity,
- n)   Economic Developments or Recessions,
- o)   Technology,
- p)   Social and Natural Environmental Change.

Factors outside the control of the company must be determined together with their impact on current operational Business Activities. Each factor must be registered and assessed by recording:

- q)   Description, by which to identify the factor,
- r)   Information Origin used to monitor its activity and influence,
- s)   Subjects and activities susceptible to the factors influence,
- t)   The assigned authority responsible for monitoring and reporting
- u)   Characteristics of the factors identified,
- v)   Management of actions to be taken when a factor is encountered,

The subjects and origin of all known external Business Operational influences must be monitored for their current and preferred level of influence and evidence of potential change, so appropriate action can be anticipated, assessed, accommodated, analyzed, and accounted for. This monitoring must include a review at planned intervals as part of the Business Program, for detecting changes in external influence factors and the subject's suitability and relevancy to the Company Business Operational activities.

2.0   The EFQM Model Execution.
Criterion 4 Creating Sustainable Value Continued
4.2 Communicate & Sell the Value
The European Foundation for Quality Management 2020 (EFQM:2020) directs us as an outstanding organization to recognize that Creating Sustainable Value is vital for its long-term success and financial strength and having designed the value and how it is created, an outstanding organization must need to effectively communicate the merits of the design and sell the value as item 4.2 within Criterion 4 which covers creating sustainable value.

In seeking solutions from BMS75000:2020 Business Management Standard for Creating Sustainable Value and the specific requirements under clause 4.2 to Communicate and Sell the Value, the prime subjects referred to will be:

4.2	Communicate & Sell the Value	BMS75k Clause 8.2	Customer Related Business Activities
		BMS75k Clause 8.4	Design and Selection Business Activities

In addition to these prime solutions the following subjects are worthy of consideration as they have significant merit in the areas of planning and providing for effective sales and marketing communications:

4.2	**Understanding the Needs and Expectations of Interested Parties**
4.2.4	**Customer Responsibility and Focus**
6.2.3	**Business Analysis and Planning**
6.2.4	**Market Analysis and Planning**
6.2.5	**Sales Forecasting and Realization**
7.6	**Resource and Support for External Influences**
8.1.2	**Marketing and Public Relations**
8.1.3	**Customer Services and Support**
8.1.7	**Servicing and After-Sales Administration**

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2.0   **The EFQM Model Execution.**
Criterion 4 Creating Sustainable Value
4.2 Communicate & Sell the Value Continued
There are several BMS75k Standard contributors to creating sustainable value which is also worthy of consideration. These are

8.8	External Business Operational Influences
8.8.1	Determining External Business Operational Influences
8.8.2	Monitoring External Business Operational Influences
9.1.2	Monitoring and Measurement of Goods and Services
9.1.4	Customer Satisfaction and Perception Evaluation
9.4	Management of Unforeseeable Events
10,1	Opportunities for Improvement
10.3	Continual Improvement.

This area of the European Foundation for Quality Management 2020 (EFQM:2020) resounds with the activity of marketing in communicating and selling the value the Company has designed and created under the directive of 4.1 in Criterion 4, and as such the Company must consider what solutions are available in the effective planning and management of its marketing and sales activities.

Clause 6.2 in Section 6.0 of BMS75k is dedicated to Business Objectives and Planning and requires the Company to consider the following directives:

6.2	Business Objectives and Plans
6.2.1	Business Objectives
6.2.2	Business Plans
6.2.3	Business Analysis and Planning
6.2.4	Market Analysis and Planning
6.2.5	Sales Forecasting and Realization
6.2.6	Financial Analysis and Planning
6.2.7	Budget Management and Cost Control
6.2.7.1	Budget Management
6.2.7.2	Cost Control

Clause 6.2.4 of BMS75k is of particular interest and relevance when a Company is seeking a solution to planning the communication and sale of the value it has designed and created. The Company is directed to complete a market analysis to determine the current opportunities, strengths, weaknesses, and threats to the business in which it is engaged. The output from the analysis must be documented and included as appropriate:

a)   Market size (current and future)
b)   Market growth rate
c)   Market profitability
d)   Industry cost structure
e)   Distribution channels
f)   Market trends
g)   Key success factors
h)   Key success Details

Market analysis determines the market risk for the Company and the current opportunities. The market analysis must be documented and contain an investigation of the markets in which the Company conducts business or is planning to intervene with a business project. This market analysis can be used to direct the Company's planning activities to inform the decision on matters related to the expansion or contraction of business activities.

These activities must include inventory, purchase, workforce, facility expansion, acquisition of capital equipment, process, goods and service development, and other business matters. As such the Market Analysis must be incorporated or referenced in the Strategic Business Plan and recognized as a controlled business record.

Clause 6.2.5 of BMS75k is likewise, of particular interest and relevance in aiding the solution to the planning communication and sale of the value the Company has designed and created which includes sales forecasting and realization. The Company is required to forecast and produce a sales prediction and a Business Plan, for the period of the Strategic Business Plan. The sales forecasts should be based on market analysis and recognized as a controlled business record.

The realization of sales during the period of the Business Plan can be measured against the forecasts and reported. Action must be taken when negative values are registered against those forecasted or planned. The Sales Forecasts Business Plan should be incorporated or referenced in the Strategic Business Plan.

Clause 8.2 of BMS75k requires us to consider Customer Related Business Activities in providing a solution to the communication and sale of the value we have designed and created. The subject is covered in five sub-clause subjects:

8.2.1	Determination of Requirements
8.2.2	Review of Requirements
8.2.3	Review of Requirement Applications and Use
8.2.4	Customer Use, Lifecycle, Support, and Provision
8.2.5	Customer Communication

Sub-clause 8.2.1 of BMS75k provides the Company with instruction on the Determination of Requirements and requires the Company to record and account for all customer-related business activities including:

a)   The customers' specified requirements, terms, and conditions of purchase or sale which can include goods and service delivery, business conduct, and after-sales activities,
b)   Known requirements omitted by the customer but known to be applicable and important by the Company,
c)   Business activities, goods or services, statutory and regulatory requirements that are known to be relative,
d)   Any known requirements for the protection of the customer or interests of other stakeholders.

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           Criterion 4 Creating Sustainable Value
           4.2 Communicate & Sell the Value Continued

> *Note 1:*   *Requirements relative to the customer-related business activities normally relate to the supply of goods or services but these can also include special requirements of a customer known to the Company that is derived or determined by the special circumstances, conditions, or known application to which the business activity, goods or service is intended to be used or applied.*

> *Note 2:*   *After-sales and service requirements include the provisions of guarantees, bonds, undertakings, and obligations. These can include, but not be limited to, environmental responsibilities or final clearance after use, conservation services and in-service support such as obsolescence provision, retention of records, goods replacement, business continuity, and provision for the investigation and reporting particularly in the event of a non-detected or benign failure.*

Sub-clause 8.2.2 of BMS75k provides the Company with instruction on the Review of Requirements requiring it to evaluate and record as a controlled business record all customer requirements related to each business activity, identifying the product or service and the version being offered or provided. This review is conducted before the start of each customer-related business activity is required to ensure that:

   a) Customer-related business activity requirements are known and understood,
   b) The requirement is declined if it cannot be matched with a product or service that is compatible and suitable
   c) Amended requirements which conflict with those previously agreed upon are resolved,
   d) The Company can fulfill all known requirements.
   e) Special requirements of each customer are determined and addressed
   f) The risk associated with each business customer-related activity has been identified
   g) There is a sufficient return to the Company on the investment to be made, or the decision to proceed is recorded as considered defendable.

Customer-related business activity does not commence before the review of requirements has been completed and recorded. If the review identifies the need for clarification or changes in the requirement, the Company must ensure records are amended and the current known requirement is being applied or provided. All authorities involved must be informed and made aware of any changed requirements.

The master record index records the current customer-related business activity details and known requirements agreed upon with the customer. Business Records of the review of requirements must be completed and retained as a controlled business record traceable to an authorized and competent authority.

Sub-clause 8.2.3 of BMS75k provides the Company with instructions to Review a Requirements Application and use it when the customer-related business activity is dependent on the advice and know-how of the Company. *(e.g., for sizing or quantifying a requirement based on a statement of application or duty),*

In such events, the Company is responsible for the advice, recommendation, or offer given and must ensure that the goods and services offered or provided because of the customer-related business activity, can fulfill all known requirements.

The Company must record a problem statement or provide a statement of requirement specifying what the customers related business activity requirements are. This is recognized as a controlled business record. To assist a customer in producing a statement of requirements, we have developed standards and checklists against which can be recorded the available details and data. These standards are used for preparing the customer's contribution and problem statement against which to make recommendations and for which customer-related business activity can proceed on an informed and agreed basis.

Sub-clause 8.2.4 of BMS75k provides us with instructions on the Customer Use, Lifecycle, Support, and Provision which require the Company to supply goods or services, supported by the Company for the duration of the known application. Here the Company must establish the criteria for the expected period of use and the support required for the envisaged period on the goods and services provided. Support must be suitable and enough for the intended use and period of use by known customers and end users.

The Company must identify the possibility of risks associated with goods and service obsolescence and plan for the eventuality as part of the risk management practice. There is an acknowledgment in the business activity of the obligation to customers which can be compromised by a decision to make goods or services obsolete, and this is anticipated from a risk perspective. Notification from marketing, design, or purchasing that goods or services are to be phased out or must cease to be available from a particular date, must be reviewed and all affected customers and authorities notified. This information must be recorded and recognized as a controlled business record.

Contractual obligations to which the Company is committed must be reviewed and assessed upon notification, or the possibility of obsolescence becomes a concern. Obsolescence control and retirement of goods or services at the end of their life cycle must be considered using both external and internal applications as appropriate.

During the obsolescence plan implementation, support must be given to the parallel operations of the old and new goods with stocks and manufacturing availability. These ensure the conduct for a smooth transition to the replacement goods and services, proceeds under controlled and planned conditions.

When the activity involves goods and services being phased out and replaced, the arrangements required must be reviewed and managed. The retirement will be agreed on or requested by the customer which can be in response to a proposal or recommendation. Provision for the cessation of full or partial arrangements to stock and support after a certain period must be fulfilled.

A plan to remove goods or service availability can be actioned and implemented once agreed with all stakeholders including contracted and involved parties. A retirement plan to remove active support by the Company must be available when required. This retirement planning will include, input from all authorities and known users and address the following items:

   h) Cessation of full or partial support after a certain period.
   i) Archiving of the goods or service records and documentation.
   j) Responsibility for any future residual support issues.
   k) Transition to the new goods or service, if applicable.
   l) Accessibility of archive copies of documents and data.

Once the plan has been developed it is authorized and approved by the relevant authorities before actioning as a controlled business record.

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Criterion 4 Creating Sustainable Value
4.2 Communicate & Sell the Value Continued

Sub-clause 8.2.5 of BMS75k provides the Company with instructions on Customer Communication and requires it to determine and provide within each customer-related business activity, effective arrangements for communicating with customers about goods or services. This information includes inquiries, contracts, requirement changes, order handling, and customer feedback, as well as customer complaints and must be the subject of a documented business practice. Complaints and feedback relating to a customer-related business activity must be reviewed and assessed for any contribution to business improvement including goods and service improvements. Complaints and feedback relating to the quality of the management or business conduct must also be recorded and reviewed as a controlled business record for contribution to the Business Management System improvements and the Company's obligations to stakeholders. All customer communications in which a complaint, commendation, or statement of perception is identified must be recorded and recognized as a controlled business record.

Clause 8.4 of BMS75k addresses Design and Selection Business Activities and provides several solutions to the problem of Creating Sustainable Value and the specific requirements under clause 4.2 to Communicate and Sell the Value. When design and selection are identified within the Strategic Business Plan, as a principal business activity, the Company must document the design and selection practices to include requirements and objectives for design and selection.

The practice must anticipate, assess, accommodate, analyze, and account for the design and selection of business activity under the description of Company technology, goods, and service range. Receiving, reviewing, and processing design work instigated by the research and development business activity must be accommodated in the documented practices as well as stewardship of the current goods and service ranges provided to realize the sales and marketing objectives. Stewardship of the Company designs must include administration of the document and data configuration with the Company products and services. This can be defined in a Master Index Register containing the current base line release and current build standards of the Company product and service documentation.

When selection is identified within the Strategic Business Plan, the Company must establish maintain and operate an effective selection business activity to convert internal and customer specifications and duties into proposals for products and services. The Company must integrate into each selection decision, knowledge, and responsibility for the goods or service safety and environmental impacts, created or envisaged because of the business activity. This must include safe and responsible arrangements for a period of expected use, migration, and disposal of the products or services after use.

Selection business activities must be defined and communicated in a documented practice. The Company must administer the design and selection of goods and services offered to customers or provided in connection with internal business activity. Selections and recommendations for products or services offered by the Company against each known requirement involve, a duty or application being provided by the customer and matched against a solution offered by the Company. Planning of the design and selection of business activity should consist of:

    a) Assessment of work and tasks received for adequacy and correctness before commencing or registration,
    b) Registration of design and selection work requirements received and accepted,
    c) Establishment and determination of vocations, skills, know-how, and other resource requirements
    d) Assessment and recording of design and selection competence requirements and availability
    e) Matching requirements for the design and selection with available capacity and resources
    f) Identifying and managing stages, for the extent and timescales involved in verification activities,
    g) Authorization, allocation, and release of the design and selection work when completed,

The design and selection plan must include:

    h) Itemized list of design activities and objectives for each listed item
    i) Resource requirements and allocations
    j) Design and selection team allocations
    k) Provision for Make or Buy considerations
    l) External design and selection contributions
    m) Costs and estimates

In addition to the above, consideration and provision within each design and selection plan must be made, where applicable, to document additional information which can include:

    n) Availability of information to commence each task.
    o) Criteria required to verify completion of each task.
    p) Roles and responsibilities of the team members involved.
    q) Time and finance, required for each activity.
    r) Practices, methods, or know-how to be employed or acquired.
    s) Technological uncertainties and risk mitigation strategies for each task.
    t) Stages identified for regulatory, customer, or 3rd party approvals and validations.
    u) intellectual property considerations.

> *Note 1:* Intellectual property can include Company ownership of copyrights, trademarks, patents, industrial design rights, trade secrets, and indigenous property which requires consent or license from external providers or authorities who hold the property to such rights.

The Company must assign the design and selection of business activity to distinct disciplines and, for each activity, define the tasks, necessary resources, responsibilities, design competences, input and output data, and planning issues or constraints. For each design and selection business activity the Company must consider the ability to produce, inspect, test, and maintain the goods or services being selected or designed. The different design and selection tasks to be carried out within each business activity must be based on the safety and functional objectives as well as the attributes and advantages of the goods or services being selected. This must be within the Strategic Business Plan as well as customer, statutory and regulatory requirements.

The Company must manage the interfaces between different and distinct disciplines and groups involved in the design and selection of business activity to ensure effective communication and clear assignment of responsibility is achieved. Planning output is updated, as appropriate, as the design and selection of business activity progress or changes are required.

> *Note 2:* Distinct disciplines can consist of a dedicated design function such as IT, Electrical, Mechanical, Cosmetic, Fabric, and similar vocations or collectively such as Production, Logistic, Process, Publicity, or Distribution.

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        4.2 Communicate & Sell the Value Continued

Sub-clause 8.4.4 of BMS75k introduces the controls needed over Design and Selection Inputs. Information and inputs to the design and selection business activity are assessed and verified for adequacy and correctness before assigning to a competent design and selection discipline. The decision to proceed with the information provided must be made by an assigned authority and recorded as a controlled business record.

Information provided to design business activities must be complete and suitable for the design activity to commence converting an instruction into a product or service that can:

      a)   Meet the specified duty, performance, and known application
      b)   Be produced, measured, and tested to defined requirements
      c)   Comply with relevant statutory and legislative instruments or regulations
      d)   Be identified with previous design experience of similar or compatible solutions
      e)   Contribute to the Strategic Business Plan
      f)   Accommodate other known and relative stakeholder requirements
      g)   Provide for selection of products and services to be made against predetermined schedules and templates

Information provided for the selection business activities must be complete and suitable for the selection of products and services to be made by:

      h)   Fulfilling the customer requirements against a known duty, performance, or application
      i)   Being identified, measured, and tested to customer requirements
      j)   Compliance with all relevant statutory and legislative requirements
      k)   Using design prescriptions and templates for the correct selection
      l)   Contributing to the Strategic Business Plan
      m)   Accommodating all other known stakeholder requirements

      Note1:   *Design is recognized as the business activity which provides a manufacturing, producible or deliverable solution for a given requirement, whereas selection uses the work completed by design to find a match or solution to an internal or customer's application.*

Sub-clause 8.4.5 of BMS75k introduces the controls needed over Design and Selection Outputs. Information, instruction, prescriptions, and output from the design and selection business activity must be assessed and verified for adequacy and correctness before release. All output must be registered after verification and subject to configuration control. The decision to issue the information provided must be made by an assigned competent authority and recorded as a controlled business record.

8.4.5.1   Output and Product of Design Business Activities
The product or outputs of the design business activity must be identified with a defined base line release for its initial build standard. This must be verified and approved before its incorporation and registered within the master records index configuration control records of the Company products. Only after verification can any product from the design business activity be registered as complete and its base line release recorded as the build standard in the master index register. The base line release, build standard, and master index register must be recognized as controlled business records.

Output and product of design business activities must be assessed to ensure that:

      a)   Input requirements for business activity have been satisfied or amended to accommodate output results
      b)   Correct and adequate information for receiving business activities to use and deploy has been provided,
      c)   Criteria with which to determine compliance or identify errors are available,
      d)   Safety aspects and attributes that impact correct application or deployment have been addressed
      e)   All applicable critical matters for other business activities to address are ready to commit.

The Company must define the data required to allow the product of the business activity to be identified, manufactured, inspected, used, and maintained for the agreed, specified, or intended period of use.

The output subjects for the selection business activity must be provided for in the design output sufficient for selections to be made correctly from basic information provided by the customer's specified duties and applications for the current version of products and services. Only after the specified design provided requirements relating to the product or service attributes and application, have been correctly matched with a customer's requirements should a selection be made and confirmed.

All selection business activities must be completed as provided for within the master index register and recorded as a controlled business record. These selection business activities output must be assessed to ensure:

      f)   Selection meets the design requirements for the duty and application of the product
      g)   A selection must meet the customer's specified requirements
      h)   Alternatives have been considered in arriving at the product or service selected
      i)   Selection is suitable for the known environment in which it must be used
      j)   Correct and adequate information has been provided for the selection to be made,
      k)   Design-supplied criteria have been used correctly with which to determine the selection and omit errors,
      l)   Safety aspects and attributes that impact the selection have been considered and addressed
      m)   Applicable critical matters for other business activities have been addressed and communicated.

The Company must define the data required to allow correct selections to be made and identified for the agreed, specified, or intended period of use. Records of the design and selection of business activities must be completed and retained for the envisaged life of the products and services, or as otherwise agreed between the Company and its customers and stakeholders. All documents must be identified and controlled under the Company documented configuration control practices which require records to have information as to its version and applications in which the record has been used or referred to as part of its configuration.

All design and selection records must be accessible to qualified and authorized design and selection assigned authorities and correlated and configured to the products to which they relate.

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4.3 Deliver the Value

The European Foundation for Quality Management 2020 (EFQM:2020) directs us as an outstanding organization to recognize that Creating Sustainable Value is vital for its long-term success and financial strength and having designed the value, defined how it is created, communicated, and sold, an outstanding organization must need to deliver the value.

In seeking solutions from BMS75000:2020 Business Management Standard for value delivery as an integral part of Creating Sustainable Value we can be directed by Clauses 8.1 and 8.6.

4.3	**Deliver the Value**	**BMS75k Clause 8.1**	**Operational Planning and Control**
		BMS75k Clause 8.6	**Business Goods and Service Processes**

In addition to these prime solutions the Company would be well advised to consider the following subjects which are worthy of consideration as they have significant merit in the areas of planning and providing for effective delivery of value:

4.0	**Context of the Business**
4.1	**Understanding the Company and its Relations**
4.2	**Understanding the Needs and Expectations of Interested Parties**
4.5	**External Business Considerations**
5.0	**Governance and Commitment**
5.2	**Business Management Policy**
5.5	**Cultural Issues and Conventions**
6.0	**Business Planning**
6.1	**Actions to address Risks and Opportunities**
6.1.6	**Goods and Service Planning Analysis and Reviews**
6.2.6	**Financial Analysis and Planning**
6.3	**Business Continuity**
6.4	**Management of Change**
7.0	**Support**
7.1	**Resources**
7.2	**Competence and Capability**
7.3	**Awareness and Understanding**
7.4	**Communication**
7.5	**Documented Information**
7.6	**Resource and Support for External Influences**
8.0	**Business Operation**
8.7	**Control of Non-conforming Products and Services**
8.8	**External Business Operational Influences**
9.0	**Business Performance Evaluation**
9.1.2	**Monitoring and Measurement of Goods and Services**
9.1.7	**Stakeholder's Perception, Expectations, and Satisfaction**
9.4	**Management of Unforeseeable Events**
10.0	**Business Improvement**
10,1	**Opportunities for Improvement**
10.2	**Nonconformity and Corrective Action**
10.2.1	**Non-conformance Identification and Containment**
10.2.2	**Root Cause Analysis**
10.2.3	**Corrective Action**
10.2.4	**Preventive Measures**
10.3	**Continual Improvement.**

The solution to delivering the value is invested in **Clause 8.1 of BMS75k** which introduces the Company to the substantial subject of Operational Planning and Control. This covers the whole business of product realization, production, and manufacture as well as service delivery. Marketing, sales, research, development, design, and selection have already been addressed in the criterion of 4.1 Design the Value & How it is Created and 4.2 Communicate & Sell the Value. Consequently, this project would not be well served by revising these solutions, it is however important to record that design and development have a contribution to make to the delivery of value and the processes in use.

Section 8.0 of the BMS75000:2020 Business Management Standard contains 8 prime headings covering the product realization life cycle. The Company must identify the operational processes with which to manage the operational business activities stated in the Strategic Plan.

The Company must ensure these processes are controlled and documented to the greatest practical extent in process plans, documented practices task instructions, and work instructions, for consistency in operations and to communicate requirements to operational or service delivery departments and authorities.

The requirement for each operational process includes those needed for

a)	Commencing the process	(Inputs)
b)	Activities involved in the process	(Practices)
c)	Product of the process	(Outputs) and
d)	This means measuring the timeliness, quantity, and quality of the product of the processes at each stage in its sequence.	

Note: *Each process shall normally only have a single product but may depend on numerous inputs and contain several activities in sequences that must follow a defined route. Such multi-dependent activities when documented are referred to as a Process Plan.*

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4.3 Deliver the Value Continued

Clause 8.1 of BMS75k introduces the subject of Operational Planning and Control as a solution to value delivery. This consists of:

8.1	**Operational Planning and Control**
8.1.1	**Financial Administration and Accounts**
8.1.2	**Marketing and Public Relations**
8.1.3	**Customer Services and Support**
8.1.4	**Technical Services and Support**
8.1.5	**Goods and Service Management and Distribution**
8.1.6	**Process Management and Stewardship**
8.1.7	**Servicing and After-Sales Administration**
8.1.8	**Goods, Service, and Process Configuration Management**

Clause 8.1 of BMS75k provides the solution for planning and controlling the product realization process and instructs us to correctly deliver the value the Company will have designed and sold. Under this clause, the Company is directed to plan, implement, monitor, and control each of the operational processes and business activities identified in the Strategic Plan by:

a)   Determining and communicating the criteria for the operational business activities and their processes in a Business Plan,
b)   Implementing control of the processes by monitoring activities and performance under the provisions made in the Business Plan
c)   Completing and retaining records necessary to demonstrate that the business processes have been carried out as planned.

Management of all intended changes in each business process must be planned and reviewed to the greatest practical extent so that the consequences of any unintended changes are removed. All risks identified as a result of operational processes and changes to planned requirements must be managed under the provisions and practices detailed in the Risk Management Procedures.

Changes to planned requirements can only be actioned by the Company after completing a thorough technical and comprehensive review and evaluation of the changes intended and their impact on the business activities of the Company and all other interested parties and stakeholders. The review, evaluation, and consequences of each change must be determined and recorded as a controlled business record.

> *Note:*   *Where the Business activity technology or orientation is labor intensive, provision for a separate section in the strategic plan can be given over to Human Resources throughout the text of 8.1.1 to 8.1.7 the contribution of human resources and requirements for skills and know-how is considered as part of the duties and responsibilities of the vocational subject sections.*

Sub-Clause 8.1.1 of BMS75k provides the Company with its Financial Administration and Accounts solution for the delivery of value. The finance and accounts assigned authority is required to produce the details needed for the financial content of the Strategic Plan. This can be included in the Strategic Plan or contained in a separate Financial Business Plan and referred to in the Strategic Plan. The finance and accounts assigned authority will be responsible for the development and implementation of documented practices to detail the reporting and achievement of the Strategic Plan's financial aspect and objectives.

The achievement of the Strategic Plans financial aspect and objectives must be reviewed at planned intervals by the Business Management Representative. The review criteria, scope, frequency, and methods must be defined in a documented practice and reflected in the Business Program. Under the Business Program, a Financial Review must be planned, undertaken, recorded, and reported as a controlled business record.

Sub-Clause 8.1.2 of BMS75k provides the Company with its Marketing and Public Relations solution for the delivery of value, for which the marketing assigned authority is required to produce the marketing analysis and details for the Strategic Plan. This can be contained in a dedicated section of the plan or referenced as a separate Marketing Analysis and Report. The reports, and achievement of the Strategic Plans for marketing and public relations objectives must be reviewed at planned intervals by the Business Management Representative. The review criteria, scope, frequency, and methods should be defined in the documented practice and reflected in the Business Program.

The marketing assigned authority will be responsible for the development and implementation of documented practices for the reporting and achievement of the Strategic Plans marketing and public relations objectives. This must always include the verification of the integrity of the Company by way of records and reports. Marketing reviews must be planned, undertaken, recorded, and reported as a controlled business record by the Business Program.

Sub-Clause 8.1.3 of BMS75k provides Customer Services and Support solutions to the delivery of value. The Sales and Customer Services assigned authority will be required to produce the sales prediction and analysis details for the Strategic Plan based on the market analysis which can be contained in a dedicated section of the plan or referenced as a separate Sales Analysis and Forecast. The reporting and achievement of the Strategic Plans and sales objectives must be reviewed at planned intervals by the Business Management Representative. The review criteria, scope, frequency, and methods will be defined in the documented practice and reflected in the Business Program.

The Sales and Customer Services assigned authority will be responsible for the development and implementation of documented practices and the reporting and achievement of the Strategic Plans and sales objectives to direct the Company's planning activities and informed decisions on matters related to the expansion or contraction of business activities. Under the Business Program, sales reviews must be planned, undertaken, recorded, and reported as a controlled business record.

Sub-Clause 8.1.4 of BMS75k provides the Technical Services and Support solution to the delivery of value. The technical assigned authority is required to produce the details and description of the Company's technology, goods, and service range for the Strategic Plan which can be continued in a dedicated section of the plan or referenced as a separate document describing the current goods and service ranges provided by the Company and the planned developments of new goods and services required to realize the sales and marketing objectives. The reporting and achievement of the Strategic Plans' technical objectives must be reviewed at planned intervals by the Business Management Representative. The review criteria, scope, frequency, and methods will be defined in the documented practice and reflected in the Business Program.

The technical assigned authority will be responsible for the development and implementation of goods and service-related documented practices for the reporting and achievement of the Strategic Plan technical objectives. Under the Business Program, goods and service reviews will be planned, undertaken, recorded, and reported as a controlled business record.

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          Criterion 4 Creating Sustainable Value
          4.3 Deliver the Value Continued

Sub-Clause 8.1.5 of BMS75k provides direction for the Company on the Goods and Service Management and Distribution solution to the delivery of value. The management and distribution assigned authority is required to produce the goods and service accommodation, logistical and distribution descriptions, and content of the Strategic Plan. This must describe the current logistical and provisioning resources provided by the Company and the planned development of new resources required to realize the sales, marketing, and technical objectives.

The reporting and achievement of the Strategic Plans' logistical objectives must be reviewed at planned intervals by the Business Management Representative. The review criteria, scope, frequency, and methods will be defined in the documented practice and reflected in the Business Program. The management and distribution assigned authority are responsible for the development and implementation of goods and service stewardship and distribution-related documented practices for the reporting and achievement of the Strategic Plans' logistical objectives.

Under the Business Program, logistical and distribution arrangements must be planned, undertaken, recorded, and reported as a controlled business record.

Sub-Clause 8.1.6 of BMS75k provides directives to the Company on the Process Management and Stewardship solution to the delivery of value. The process management assigned authority is required to produce the value-added details relating to the production and service provision content of the Strategic Plan**.** This must describe the current resources available, the production processes in use and planned to produce the current goods and service range offered, and the planned development of new resources required to realize the sales, marketing, technical and logistical objectives.

The reporting and achievement of the Strategic Plans' production and service provisioning objectives are reviewed at planned intervals by the Business Management Representative. The review criteria, scope, frequency, and methods are defined in the documented practice and reflected in the Business Program.

The process management and stewardship assigned authority will also be responsible for all details relating to the production of goods and availability of services for which documented practices must be developed for the reporting and achievement of the Strategic Plans production and service provisioning objectives.

Under the Business Program, the provisioning of goods and service arrangements must be planned, undertaken, recorded, and reported at planned intervals as a controlled business record.

Sub-Clause 8.1.7 of BMS75k provides directives for the Company on the Servicing and After Sales Administration solution to the delivery of value. The servicing and after-sales assigned authority is required to produce the in-service support details relating to the after-sales content of the Strategic Plan. This must describe the current and future requirements for resources and arrangements needed to support the use of the goods and services provided to realize the known customer satisfaction objectives.

The reporting and achievement of the Strategic Plans support and after-sales service provisioning objectives must be reviewed at planned intervals by the Business Management Representative. The review criteria, scope, frequency, and methods will be defined in the documented practice and reflected in the Business Program.

The servicing and after-sales assigned authority is responsible for all details relating to the support of goods and availability of services for which documented practices must be developed for the reporting and achievement of the Strategic Plans support and after-sales service provisioning objectives. Under the Business Program, the provision of servicing and after-sales arrangements must be planned, undertaken, recorded, and reported as a controlled business record.

Sub-Clause 8.1.8 of BMS75k provides the Company with directives for the Goods Service and Process Configuration Management solution to complete the delivery of value. The Company must establish, implement, and maintain a configuration management process that includes the following activities,

  a) Configuration management planning
  b) Configuration identification
  c) Change control
  d) Configuration status accounting, and
  e) Configuration audit

Configuration management must be implemented and documented as appropriate to the Company's business activities and goods, or services provided. Configuration differences in the business activity, goods, and service must be identifiable and apparent by unique identity to the extent that:

  f) Differences in the characteristics and attributes of activity, goods, and service are identifiable and apparent,
  g) Differences in business activity, goods, and services whose characteristics and attributes are identical but have been achieved by different activities or means of production are identifiable and apparent,
  h) Differences in the measurement, hierarchy of assessment, testing, or inspections are identifiable and apparent,

Where appropriate, all business activities must be configured to the goods or services provided. The configuration of Business Management must be the subject of documented practices applied from clause 8.2 to 8.5 of the BMS75k Standard and identified with each of the subjects within the Strategic Business Plan. The documented practice for configuration control will include the establishment and maintenance by the Company of a Master Index Register containing the current baseline release, amendment history, and current build standards of the Company product and service documentation.

The documented practice must define the arrangements for the maintenance of the Master Index Register in sufficient detail to ensure that where more than one version of a product or service is in use, each version of the product or service is recorded, and its component content and deployment configuration is known and traceable to all relevant documents and records. In addition, records of each version in use must be traced to a customer or location by records maintained in the Master Index Register or by self-identification of a product or the service itself.

Deviations in version and build standards created to accommodate the specific requirements of a non-standard or special design application must be recorded and identified as a deviation from the standard version master record. Records must be maintained of all decisions relative to the configuration management of process, goods, and service provision. These will be recognized as a controlled business records.

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Clause 8.6 of BMS75k introduces the Company to the subject of Business Goods and Service Planning and Control as a solution to value delivery. This section consists of:

8.6	**Business Goods and Service Processes**
8.6.1	**Control of goods and service provision**
8.6.1.1	**Process Safety and Environmental Impacts**
8.6.1.2	**Process Verification**
8.6.1.3	**Control of Changes**
8.6.1.4	**Control of Process Changes**
8.6.1.5	**Control of Equipment, Tools, Software, and Programs**
8.6.1.6	**Post-delivery Support**
8.6.2	**Validation of Processes and Service Provision**
8.6.3	**Identification and Traceability**
8.6.3.1	**Identification and Management of Changes**
8.6.3.2	**Traceability, Integrity, and Provenance**
8.6.3.3	**Obsolescence and Substitution,**
8.6.4	**Control of Work Transfer**
8.6.5	**Customer Property**
8.6.6	**Prevention Against Counterfeit Goods**
8.6.6.1	**Responsibility**
8.6.6.2	**Control Plan**
8.6.7	**Preservation and Release of Goods and Service**

The goods and services produced because of the Company's business activity and the processes involved must be planned and controlled. Planning of the goods and service processes business activity will be the subject of a documented practice and consistent with the requirements of the other processes of the Business Management System that contribute to the Strategic Business Plan.

Sub-Clause 8.6.1 of BMS75k introduces the subject of Control of Goods and Service Provision as a solution to value delivery and requires the Company to plan the production and service provision business activity by the use of documented practices or their equivalent. Production, manufacturing, distribution of products, or delivery of services must be controlled by effectively operating and verifying the practices document at nominated stages. These practices will include where applicable:

a)   Instruction and information that describes the tasks to be completed,
b)   Instruction and information that describes the goods to be produced or delivery of services,
c)   Provision and use of the correct equipment under informed instruction,
d)   Monitoring and measuring the effectiveness of methods and processes used,
e)   Internal and external verification activities and resources,
f)   Measurement instructions, plans, and records,
g)   Criteria for process or service continuation or adjustments,
h)   Directives for release, delivery, and support in the use and operation of the goods and services provided,
i)   Accountability for business goods and services during production, deployment, distribution, and disposal,
j)   Removal of foreign objects and action required to prevent contamination or deterioration of goods or services,
k)   Utility and consumables monitoring and control,
l)   Standards of workmanship and prescribed levels of quality
m)   Critical process aspect control, necessary for the correctness of the goods or services being produced,
n)   Variable data know-how and analysis required to identify and measure deviations,
o)   In-process inspection and testing when final checks cannot be used to verify goods or service correctness,
p)   Any special processes deemed worthy of additional or specific monitoring, recording, adjustments, and controls,

The design and provision of quality plans are required as contributing documents to the baseline release and master records index for the products and services provided. Quality plans and the results recorded must be recognized as a controlled business record.

> *Note:*   *The use of process, goods, and service business quality plans in connection with the control of goods and service provision is highly recommended. These are consistent with the requirements of the other processes of the Business Management System and its contribution to the Strategic Business Plan.*

Sub-Clause 8.6.1.1 of BMS75k develops the solution by addressing the subject of Process Safety and Environmental Impacts. The Company must establish, implement, and maintain instructions and a documented practice to identify the safety and environmental impact of value delivery. This includes the production of the goods and service delivery within the operations as defined in the scope of the Strategic Business Plan together with those aspects of the business operation over which the Company has the greatest control or influence.

All processes used in the production and manufacture of the goods or deployment of services must be assessed for their safety and environmental impact. The assessment must also be repeated at planned intervals and accommodated within the Business Program.

This must be matched and reviewed at planned intervals against the current legislative and statuary requirements applicable to the tasks involved. Records must be maintained of the assessments and reviews which will be recognized as a controlled business records.

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         Criterion 4 Creating Sustainable Value
         4.3 Deliver the Value Continued

Sub-Clause 8.6.1.2 of BMS75k develops the solution for value delivery by addressing the subject of Process Verification where the Company must define and implement controls in a documented practice for the validation of processes used in business activity.

This is important when subsequent inspection and testing of products produced, or services deployed cannot verify the correctness of the processes involved. It demonstrates that the selected technology and methodology can produce the quality of goods and services specified.

The documented practice must define the scope of decisions each assigned authority has in the process selection, deployment, and verification including the process capability and the need to maintain records of samples (FOIS) and representative items from the initial production or provision of a new part, product, process or service.

When the Company relies on the results of the initial process validation samples for the release of subsequent goods and the delivery of services, the processes used must be controlled within specified limits to assure the correctness of the goods and services being produced. Planned and regular comparisons with the agreed sample must be recorded and the record recognized as a controlled business record.

The master records index will contain a listing of critical aspects of the goods or service that if changed, would invalidate the test results, and necessitate a new sample or re-test. The index must have lists consisting of data on key characteristics, and specific actions to be taken to consistently produce the same quality of goods or services.

When a change invalidates or exceeds the limits set, the process validation practice must be repeated, and action taken to ensure the configuration control of the goods or services involved is clearly and positively identified or traceable to each change introduced. Records must be maintained of the assessments and reviews of process validation results which will be recognized as a controlled business record.

Sub-Clause 8.6.1.3 of BMS75k develops the solution for value delivery by addressing the Control of Changes. The build standard established for the goods or services being released must contain or refer to all documents and records needed to provide for verification of the goods and services produced against the design and selection specifications. When changes to the goods are required, a change request record must be raised which contains:

   a)   Description of the changes and the actions required.
   b)   Timing and effective date of the changes coming into effect.
   c)   Accounting and disposition of existing goods in process, stored, distributed, or in use.
   d)   Authorities are responsible for authorizing the changes and those authorities are tasked with servicing them.
   e)   Reference to the information on which the change decision can be made.

The results of changes to the goods and services must be assessed before the decision to approve or authorize the change. This is required to confirm that the desired effect has been achieved without adverse effects on goods or service quality and conformity. Records are maintained of all decisions relative to changes and results and recognized as a controlled business record.

Sub-Clause 8.6.1.4 of BMS75k develops the solution for value delivery by addressing the Control of Process Changes. Personnel authorized to approve changes to manufacturing processes or deployment of services must be identified as assigned authorities.

The Company must control and document all aspects affecting changes in service content and deployment, processes, production equipment, tools, or software programs. Process changes must be identified in the goods or service configuration even if dimensional or specifications remain unchanged.

The master records index should contain a list of critical aspects of the goods and services that if changed, would invalidate the test results, and necessitate new samples, re-test, or assessments. This list will consist of product or service attributes, advantages, and key characteristics, identifying the specific actions to be taken to consistently produce the same quality of goods or delivery of services and recognized as a controlled business record.

Goods or services released to the same specification but produced or delivered from differing processes must be identified as such and released under separate and identifiable configurations, traceable to the specification, build standard, and process route or passage used. This also applies when differences are incurred because of:

   a)   Variations in the process plans or prescriptions,
   b)   Variations in the known applications or use,
   c)   Variations in the design criteria or development,
   d)   Variation in suppliers, subcontractors, materials, or consumables,
   e)   Different plant, machinery, or equipment has been used,
   f)   Variation in process timings, sequence, routes, or schedules,
   g)   Changes in software, firmware, technology, or hardware,
   h)   Changes in test methods or acceptance criteria,
   i)   Variations in inspection, testing, and control methods or equipment,
   j)   Differences in the application of management practices or standards,

When business activity variations or changes are applied, the criteria for the use of previous testing and inspection results must be considered for compliance. Appropriate action will have to be taken when such tests are deemed to be compromised or not relative.

The results of business activity change in production processes and delivery of service must also be assessed and recorded to confirm that the desired effect has been achieved without adverse effects on goods or service conformity with the specified requirements and recognized as a controlled business record.

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      4.3 Deliver the Value Continued

Sub-Clause 8.6.1.5 of BMS75k includes the Control of Equipment, Tools, Software, and Programs in the solution for value delivery. When the Company's business activities are dependent on equipment, tools, software, and IT programs for the automation and control or measurement of the goods, processes, and services, such equipment must be proven before use to demonstrate its suitability, capability, and correctness for the specified tasks involved. Records of the equipment proving, and validation should be maintained and recognized as a controlled business record.

The Company must validate production equipment, tools, and software programs used to automate, control, or monitor processes and service correctness before its deployment which includes storage requirements for such equipment, including periodic checks on the afforded preservation and condition.

A documented practice should be used to define the arrangements required for equipment or tooling in storage for prolonged periods or which are susceptible to requiring regular adjustments during inactivity or infrequent use.

The Company must determine the monitoring and measurement to be undertaken and the monitoring and measuring devices needed to provide evidence of conformity of goods or services to determined requirements.

A register of all monitoring and measuring equipment must be maintained in which the process employed for calibration, verification, and adjustment is recorded which also applies to test software, firmware, or hardware used to produce data. When used in the monitoring and measurement of specified requirements, the ability of computer software to satisfy the intended application is always proven before use. These must be confirmed and the results recorded before initial use and reconfirmed and recorded as necessary, the records of which must be recognized as a controlled business record.

The Company must establish processes to ensure that monitoring and measurement of the business activities can be carried out and are carried out in a manner that is consistent and representative of the current goods or services being provided. Monitoring and measurement requirements must be indicative of current business activities including the relevance of the samples taken, with the current goods and services being sold, and the environmental conditions under which they are being used or deployed.

The Company is directed to establish, implement and maintain business activities and processes for the recall of monitoring and measuring equipment requiring calibration or verification and record the validity of the previous measuring results when the equipment or the practices used are found to be non-conforming to requirements. Appropriate action must be taken on the equipment and any goods or other business activities affected.

Records of the results of calibration and verification must be maintained including all decisions relative to the control of equipment, tools, software, and programs that are recognized as a controlled business record.

> **Note:**   For guidance on establishing and maintaining a calibration practice, we can refer to ISO9001 and ISO17025 the International Standards for quality management systems and calibration.

Sub-Clause 8.6.1.6 of BMS75k includes Post Delivery Support in the solution for delivery of value when the goods or service provided by the Company are in use, provisions for user support must be available as applicable for the following:

   a)   Collection and analysis of in-service data
   b)   Action to be taken, including investigation and reporting, when problems are detected after delivery
   c)   Control and updating of technical documentation
   d)   Approval, control, and use of repair schemes, and
   e)   Controls required for off-site work (e.g., Company's work undertaken at the customer's facilities.)

Post-delivery support includes appropriate after-sales services to provide for the continued use of the products or services purchased during the expected life of the products or services involved. This includes the capacity to fulfill the obligation of the Company in guarantee, warranty, upgrade or repair commitments, and ongoing relationship with the customers and ends users throughout the life cycle of the product or service, while other warranties are under time constraints.

Post-delivery support encompasses all services that assist a customer in using the Company product or services supplied correctly and ensure customer satisfaction. The Company's business activities must provide facilities whereby customers can return goods or access facilities for safe disposal after the use of all goods and services provided.

2.0   The EFQM Model Execution.
      Criterion 4 Creating Sustainable Value Continued
      4.4 Define & Implement the Overall Experience
The European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition insists that an outstanding organization must embrace change and acknowledge that Key Stakeholder needs change over time. It is therefore important to collect and analyze feedback to improve or change the products, services, or solutions being used.

The fourth and final element identified in Creating Sustainable Value is to Define & Implement the Overall Experience. Having designed the value and how to create it, communicate and sell that value and deliver the value, the Company must review the business activity to replicate what was deemed excellence and improve what was identified as less than acceptable by defining and implementing the overall experience.

One of the prime benefits derived from adopting and implementing the BMS75000:2020 Business Management Standard is the objective to simulate the conditions and occasions in which successful decisions are made. In its introduction, it states that the standard is directed at a prescription so that the Companies can compare their achievements with what is expected of their business management.

The BMS75000:2020 Business Management Standard in its 5As convention requires the Company to Account by recording and stewardship of the work done. Unless the quality of the Business Management itself, is suitably measured and continually improved, the process by which goods and services are provided cannot themselves be assured for best practice and stewardship of its stakeholders' interests, cooperation, and investments.

The BMS75k Business Management Standard cannot by itself provide failsafe guarantees that it must prevent events resulting in unforeseen financial losses or social discredit. At the same time, the establishment of an efficient internal control system centered on financial business administration, integrity, and accurate accounting practices reduces the probability of such losses and affords a degree of due diligence to its decision-makers and executives.

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2.0   The EFQM Model Execution.
Criterion 4 Creating Sustainable Value
4.4 Define & Implement the Overall Experience Continued
Providing a solution for Defining and Implementing the Overall Experience the Company can look to the recommendations for compliance with the BMS75000:2020 Business Management Standards section 9.0 which covers Business Performance Evaluation and its following clause contents:

9.0	**Business Performance Evaluation**
9.1	**Monitoring, Measurement, Analysis, and Evaluation**

In addition, the Company should also consider the records it has available from the product and service realization discussed earlier under solutions for Creating Sustainable Value.

8.1	**Operations and Control**
8.6	**Business Goods and Service Processes**
8.7	**Product and Service Non-conformance**

Applying the requirements of the above subjects the Company has available for review the following records to assist in a solution for Defining and Implementing the Overall Experience:

8.1	**Change Record in Operation Planning or Controls**
8.1.1	**Financial Review Record**
8.1.2	**Marketing Review Record**
8.1.3	**Sales Review Record**
8.1.4	**Goods and Service Review Record**
8.1.5	**Logistics and Distribution Review Record**
8.1.6	**Process and Provisioning Review Record**
8.1.7	**Service and Aftersales Review Record**
8.1.8	**Goods Service and Process Configuration Review Record**
8.6.1	**Quality Plan and Results Record**
8.6.1.1	**Process Safety and Environmental Impact Review Record**
8.6.1.2	**Product and Service Comparisons with the Agreed Sample Record**
8.6.1.3	**Decision to Change Record**
8.6.1.4	**Process Change Record**
8.6.1.5	**Equipment, Tools, Software, and Programs Proving and Validation Record**
8.6.2	**Validation of Process and Service Provision**
8.6.3	**Record and Register for Identification and Traceability**
8.6.3.1	**Decisions Relating to Identification and Change Management.**
8.6.3.2	**Traceability, Integrity, and Provenance of Product and Service**
8.6.3.3	**Record of Obsolescence and Substitution of Process and Service Provision**
8.6.4	**Work Transfer Record**
8.6.5	**Customer Property Record**
8.6.6	**Incidents of Counterfeit Products and Services** *(Including Plagiarism)* **Record**
8.6.7	**Release and Preservation of Products and Service Decision.**
8.7	**Disposition and Sentencing of Non-conforming Products or Services. Record.**

Clause 9.0 of BMS75k introduces the solution for Defining and Implementing the Overall Experience by addressing the specification and requirements for Business Performance Evaluation. The Company can review the performance of the Business Activities against the Strategic Business Plan at planned intervals following a documented practice and the provisions of the Business Program. The review includes:

a)   Strategic Business Plan and its relevance to current activities.
b)   Effectiveness of Sub-layer Business Plans and the reported achievements.
c)   Business Program and its contents.
d)   Results that have been taken from monitoring, measurement, analysis, and evaluation of business performance.
e)   Results and information derived from Internal Management Audits.
f)   Actions arising from management reviews.
g)   Actions that have been taken to address risks and opportunities.

The Company is called to test and report on the effectiveness of:

h)   Risk identification and management
i)   Make or buy decisions and their analysis
j)   Research and development activities
k)   Design and selection activities
l)   Project management planning and achievements
m)   Process planning, management, and control
n)   Outsourcing and subcontract planning
o)   Goods and service planning
p)   Business analysis and planning
q)   Market analysis and planning
r)   Sales forecasting and realization
s)   Financial analysis and planning
t)   Budget management and cost control

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2.0   The EFQM Model Execution.
Criterion 4 Creating Sustainable Value
4.4 Define & Implement the Overall Experience Continued

Clause 9.0 of BMS75k in Defining and Implementing the Overall Experience the Company is required to review the following based on the above:

u)   Current business objectives and the effectiveness of plans to achieve them
v)   Changes to the Strategic and Sub-layer Business Plans
w)   Proposed changes to the Business Objectives and Goals
x)   Plans and Provisions for Business Continuity

Account must be taken by the Company of the timeliness at which tasks and reports are completed, and their accuracy when compared against plans and objectives to which they relate or contribute. Records of the review must be maintained and recognized as a controlled business record.

Clause 9.1 of BMS75k supports the Business Performance Evaluation in Defining and Implementing the Overall Experience by requiring the Company to Monitor, Measure, Analyze and Evaluate the business activity. It is directed to determine requirements for monitoring, measurement, analysis, and evaluation of each business activity that contributes to the effectiveness of the Strategic Business Plan and the Business Program. Requirements for business activity verification activities, instructions, plans, and records include:

a)   What business practices require monitoring, measurement, analysis, and evaluation
b)   What business practices incorporate their own explicit self-assessment and examination
c)   What business practices require or would benefit from impartial assessment and verification
d)   What verification practices and stages in Business Program must provide the required business information
e)   Availability of suitable instruction and information that describes the verification tasks,
f)   Benefits to be derived from having work instructions and task instructions with expected results,
g)   Provision and use of suitable equipment, knowledge, and informed external advice or instruction,
h)   Use of available internal and external verification resources,
i)   Result assessment and criteria for adjustments, acceptance, and rejection
j)   Accountability for business activity records and use of information in related decisions
k)   Decision integrity and prevention of contamination by incorrect results and records being used,
l)   Evidence of the use of accurate information and business standards
m) Appropriate control over misinterpretation of information and data supplied.
n)   Availability and access to know-how and lessons learned
o)   Reference to and deployment of business excellence standards,
p)   How to replicate and repeat correct business activity decision-making,
q)   Verification of business decision correctness if queries are raised at the latter stages
r)   Appropriate verification records, result in retention and provenance with the business activities assessed.

Business activity performance and the effectiveness of the Business Management System must be assessed from the results produced and action taken to direct changes when such results identify variations with the Strategic Business Plan and Sub-Layer Business Plans. Records of monitoring, measurement, analysis and evaluation of the business performance must be maintained and recognized as a controlled business record.

Clause 9.1 of BMS75k is supported by several sub-clauses each dealing with a specific business activities measurement.

9.1.1   **Monitoring and Measurement of Processes**
9.1.2   **Monitoring and Measurement of Goods and Services**
9.1.3   **Shareholder Perception Evaluation**
9.1.4   **Customer Satisfaction and Perception Evaluation**
9.1.5   **Employee Perception Evaluation**
9.1.6   **Supplier Perception Evaluation**
9.1.7   **Stakeholders' Perception, Expectations, and Satisfaction**

Each offers a solution to their specific vocation and collectively provides a comprehensive answer to Defining and Implementing the Overall Experience.

2.0   The EFQM Model Execution.
Criterion 5 Driving Performance & Transformation.
The European Foundation for Quality Management 2020 (EFQM:2020) directs the Company to Drive Performance & Transformation under Criterion 5 in its execution by insisting that now and in the future, an organization needs to be able to meet the following two important requirements at the same time to become and remain successful.

1)   **("Driving Performance.")**   The Company needs to continue successfully managing the delivery of its current business operations.
2)   **("Driving Transformation.")**   The Company needs to manage constant changes inside and outside its boundaries.

To remain successful, the combination of Driving Performance & Transformation confirms the necessity for the Company to deliver for today while preparing for the future which requires two forms of improvements, continuous and radical. Major elements in enabling performance & transformation are

a)   innovation and technology,
b)   the ever-increasing importance of data, information & knowledge and
c)   the focused use of critical assets and resources.

The availability of information for analysis must be considered in the quest to reach higher performance goals. In addition, the Company must anticipate and consider the risks that can hinder its achievements. To see how to provide an informed position on which to make decisions the Company must look to its collective knowledge and experience to improve performance and that of its stakeholders. The Company must also accept that business activities can have a positive impact not only on the purpose it was designed for but on other needs that may follow from it.

Information and data for analysis can provide insight that enables the Company to see the inter-relationships between disparate parts of the business because the outcome of a decision becomes the source of information for another decision, bringing and increasing the asset of intelligence to the company.

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Criterion 5 Driving Performance & Transformation Continued.

Solutions are therefore required in respect of the following specified and listed requirements

European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition		BMS75000:2020 Business Management Standard Prime Source for Solutions	
5.1	Drive Performance & Manage Risk	6.1	Actions to address Risks and Opportunities
5.2	Transform the Organization for the Future	6.2	Business Objectives and Plans
5.3	Drive Innovation & Utilize Technology	6.4	Management of Change
5.4	Leverage Data, Information & Knowledge	7.5	Documented Information
5.5	Manage Assets & Resources	7.0-7.1	Support and Resources

2.0   The EFQM Model Execution.
Criterion 5 Driving Performance & Transformation Continued.
5.1 Drive Performance & Manage Risk

The Company will need to know what the business opportunities are and what should we be focused on as well as how to leverage corporate knowledge for its competitive advantage. When the Company implements major, strategic changes, initiatives that rely on its accumulated knowledge must be used to help speed up the changes. This must enable it to take on additional risks to plan and implement strategic changes. This can be done by quantifying, through statistical methods and measurements, the risks that affect business performance.

Performance benefits must achieve sizeable progress from aligning risk and performance management, so the Company must accept that change for improvement incurs risk and that risk must be managed and controlled. Although the Company accumulated knowledge is derived from its own experience and advantages, there are significant challenges in using data and analysis initiatives to support decision-making, notably an excessive number of such initiatives and a lack of support from executive management who's first recourse is to be risk averse in business issues.

Top executives often do not understand how to make the most of a successful collaboration corporate strategy which should not only drive the effective use of initiatives, but the latter can also help to calibrate strategy. This is achieved by continually providing deeper business insights and, often, enhancing the ability to anticipate changes in the market the Company must acknowledge an effective use of data and its analysts must give it a competitive advantage. To remain successful, the combination of Driving Performance & Transformation confirms the necessity for the Company to deliver for today while preparing for the future which requires two forms of improvements, continuous and radical.

The European Foundation for Quality Management 2020 (EFQM:2020) directs the Company to Drive Performance & Transformation and lists 5.1 in Criterion 5 to instruct the Company to Drive Performance and Manage Risk.

Clause 6.1 of BMS75k covers the actions to address Risks and Opportunities and is supported by several sub-clauses which are:

6.1.1	Risk Identification and Management
6.1.2	Make or Buy Analysis and Planning
6.1.3	Project Management Planning
6.1.4	Process Planning, Management, and Control
6.1.5	Outsourcing and Subcontract Planning
6.1.6	Goods and Service Planning Analysis and Reviews

The Company must consider the context of its business operations, activities, and purpose by assessing the needs and expectations of interested parties referred to in 4.1 and 4.2 when planning for the Business Management System. It will identify risks that are detrimental to the company's interest and opportunity risks that need to be realized in the interest of its stakeholders. To ensure the Business Management System can achieve its intended results the Company must:

a) Identify and prevent risks to the Company which are detrimental to its interests,
b) Eradicate or contain all identified detrimental activities and their consequences
c) Identify and embrace business risks and opportunities that are of benefit to its purpose,
d) Use the Business Management System to prevent detriment to its interests,
e) Continually monitor, review, and analyze results to determine the need for change
f) Determine and report on the effectiveness of any actions taken.
g) Improve the quality of management at all levels continually.

These practices are identified, documented, and integrated into the Company programs and their contribution to the Strategic Business Plan is monitored and recorded as a controlled business record.

Sub-Clause 6.1.1 of BMS75k covers Risk Identification and Management requiring the Company to establish, implement and maintain, in a documented practice, the activities required for managing all identified or foreseeable detrimental risks and their consequences including as appropriate to the Company and the business activities:

a) assignment of responsibilities for risk management
b) characteristics of the risks identified (e.g., likelihood, consequences, mitigation, and acceptance),
c) assessment, conveyance, and communication of risk consequences to managers and staff
d) management of actions to eliminate or mitigate risks that exceed the defined risk acceptance criteria,
e) accommodations for risks remaining after containment and mitigation action

The practices for risk identification and management must be the subject of a documented practice however for guidance on establishing and maintaining risk management, the Company can refer to ISO31000, the international standard for Risk Management.

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     Criterion 5 Driving Performance & Transformation.
     5.1 Drive Performance & Manage Risk Continued.

Sub-Clause 6.1.2 of BMS75k covers Make or Buy Analysis and Planning which some must find incorrectly placed in a solution to Drive Performance & Manage Risk, however its contents and direction justify its contribution.

The Company is required to demonstrate that in all principal activities the costs and benefits of using internally acquired resources have been planned by comparing the options to purchase or hire from suitable suppliers or sub-contractors. Make or buy considerations include as appropriate

   a)   Associated risks and opportunities
   b)   Cost and value to the Company of each option
   c)   Timeliness and program
   d)   The totality of the problem solution and transfer of ownership
   e)   Relative goods, or service quality
   f)   Availability and sustainability of capacity
   g)   Loss of experience, know-how, goodwill, and other intellectual property.

The make-or-buy decision must be reviewed from the full perspective of available facilities and resources with due consideration to each option and its impact on:
   h)   Maximum utilization of facilities and resources.
   i)   Transfer or conversion of underemployed facilities and resources.
   j)   Maintenance, reduction, and disposition of facilities and resources.

The impact on the Company's stockholders must be considered and, those persons or authorities that can affect, be affected by, or perceive themselves to be affected by the make or buy decision.

The practices for make-or-buy, business activities must be the subject of a documented practice and the decision to make or buy must be recorded, as a recognized controlled business record.

Sub-Clause 6.1.3 of BMS75k introduces the subject of Project Management Planning in a solution for Drive Performance & Manage Risk. As appropriate to the Company and the business activities, we are directed to plan and manage the operations within the control of the Company in a structured and controlled manner to meet requirements at acceptable risk, within the resource and schedule constraints.

Business solutions must be project managed to achieve an effective planned solution, as well as to contribute to the learning within projects and continually improve the Company's management capability. The practices for project management must be the subject of a documented practice.

Sub-Clause 6.1.4 of BMS75k introduces the subject of Process Planning, Management, and Control in the solution for Drive Performance & Manage Risk. This directs the Company to manage processes used within the conduct of the business which adds value to the goods and services produced or provided. They must be planned and controlled in a fashion that is consistent with the requirements of the other processes of documented Business Management processes, by which the Company can determine the following:

   a)   activities and requirements for the processes involved.
   b)   objectives and requirements for the product of the processes (See 6.1.6) including:

       1)   goods and service integrity and safety in use
       2)   reliability, availability, and maintainability
       3)   producibility and inspectability
       4)   suitability, integrity, and traceability of materials, components, and services used
       5)   ownership, status, and configuration of software, programs, and other intellectual property
       6)   precautions against counterfeit sub-tear goods and services
       7)   recycling or final disposal of the goods and services at the end of their life.

   c)   the need to establish Business Programs that prescribe processes, documents, and resources specific to the business.
   d)   required process monitoring, measurement, verification, validation, checks, and test activities
   e)   resource specific to the process and the criteria for completion.
   f)   records needed to provide evidence that the processes and results achieved prescribed requirements
   g)   configuration management appropriate to the process documents, data, programs, and records
   h)   resources to support the use and maintenance of the process plans and Business Programs

The output of this planning must be in a form that can be communicated and understood by the affected parties and suitable for the Company's method of operations and recognized as a controlled business record.

The Company should have a continuous improvement management project and produce a Business Program**,** to incorporate planned processes for business effectiveness and efficiency incorporating innovation flexibility, and integration with the Company's goods, services, and processes. The continuous improvement management project must provide for the effectiveness of the process used, to be assessed and reported as a controlled business record and the subject of a documented practice.

   Note 1   *A document specifying the processes of a management system (including business processes) and the resources and sequence to be applied for a specific project or contract, can be referred to as a Business Program.*

   Note 2   *The Company may also apply the requirements given in 8.3 to the development of process management, Business Programs, and individual business processes.*

   Note 3: *Process effectiveness assessment reporting is often referred to as PEARs.*

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Criterion 5 Driving Performance & Transformation.

5.1 Drive Performance & Manage Risk Continued.

Sub-Clause 6.1.5 of BMS75k introduces the subject of Outsourcing and Subcontract Planning in the solution for Drive Performance & Manage Risk and requires the Company to consider outsourcing those tasks and activities for which there is the capability to perform but insufficient resources to complete its obligations in a timely or effective manner. Outsourcing or sub-contracting is only undertaken following a make-or-buy evaluation and assessment when it is in the interest of the Company to do so. Outsourcing of processes cannot absolve the Company of the responsibility of conformity to all customers, statutory and regulatory requirements. Outsourcing and sub-contracting must be controlled to ensure:

a)   Known or foreseeable risks have been mitigated by the action taken
b)   No residual risk remains with the Company for which control is not exercisable
c)   Cost and value to the Company are known or calculable
d)   Timeliness and program are achievable or predictable
e)   Ownership of the problem is transferred
f)   Quality considerations are not compromised
g)   Strategic business objectives and responsibilities are protected
h)   Safeguards are provided against loss of experience, intellectual property, know-how, good must, and provenance.

The tasks or activities must be conveyed in written form to ensure progress and completion can be verified by each party involved in the agreement. Additional available controls are considered when appropriate. The practices for out-sourcing and control are the subject of a documented practice.

Sub-Clause 6.1.6 of BMS75k introduces Goods and Service Planning Analysis and Reviews the solution to Drive Performance & Manage Risk. The Company must plan, review, and analyze all available data for the goods and services produced or provided. Goods and service planning must be used to manage the goods and services and decisions needed during each phase of a life cycle which includes:

a)   The introduction and withdrawal of goods or service
b)   Risks associated with the goods or service
c)   Goods or service ownership, configuration, and responsibility
d)   Goods and service costing, sales, revenue, profits, forecasting, and development
e)   Understanding of the customers' needs and use relating to the goods or service
f)   Goods and service development and improvement to exceed customers' expectations
g)   Suitability, integrity, and traceability of programs, materials, components, processes, and services used
h)   Selection and partnering of suppliers and their contributions to the goods or service
i)   Producibility, inspectability, and criteria for correctness and completion of the goods and service
j)   Ownership of goods or services intellectual property, patents, and licenses
k)   Goods and service reliability, availability, and maintainability
l)   Goods and service integrity, precautions against counterfeit goods, and safety in use
m)   Goods and service compliance with specified standards, known expectations, and statutory instruments
n)   Obligations in respect of migration, retirement, obsolescence, and replacement
o)   Recycling or final disposal of the goods and services at the end of their life.
p)   Directions to and contributions from other internal operations and activities within the Company

These aspects and applications of the goods and services must be assessed, analyzed, and reviewed at planned intervals to improve the goods and service success during each of the phases of its life cycle (development -introduction – growth – maturity – decline). As part of each assessment or review, the Company should demonstrate through documented knowledge of the goods and services provided:

q)   An understanding of how the goods or service works within its known applications,
r)   The resources, including know-how, needed for the continued production or delivery of the goods or service
s)   The resources and arrangements needed for the in-service support of the goods and services
t)   Obligations and commitments for suitable arrangements to provide for the replacement of obsolete items.
u)   The legal and statutory requirements applicable to the production, sale, and use.
v)   Protection and provision for recourse against counterfeit goods and services.

The analysis and review of goods and service planning must be recorded as a controlled business record and the practices for goods and service planning analysis and reviews should be the subject of a documented practice.

2.0   The EFQM Model Execution. Criterion 5

Driving Performance & Transformation Continued.

5.2 Transform the Organization for the Future.

The European Foundation for Quality Management 2020 (EFQM:2020) directs the Company to Drive Performance & Transformation and lists 5.2 in Criterion 5 to instruct the Company to Transform the Organization for the Future. Knowing what the future is going to be and how the Company can manage the changes necessary to be successful requires it to anticipate the needs and expectations of its stakeholders in the short and long term. One of the prime benefits derived from adopting and implementing the BMS75000:2020 Business Management Standard is the objective to simulate the conditions and occasions in which successful decisions are made. Its 5As convention requires the Company to anticipate the initial activity in business administration.

Clause 6.2 provides directives on how to set business objectives and plans which when coupled with **Clause 6.4** covering the management of change, enables the Company to provide the solution to Transform the Organization for the Future. In addition, consideration should also be given to the following subjects covered by the standard which supports the solution:

5.4   **Documented Business Management System**
7.1.1   **Resource Requirement Identification**
7.6   **Resource and Support for External Influences**
8.2.4   **Customer Use, Lifecycle, Support, and Provision**
8.3   **Research and Development Business Activities**
8.4   **Design and Selection Business Activities**
8.8.2   **Monitoring External Business Operational Influences**
9.1.3   **Shareholder Perception Evaluation**
9.1.7   **Stakeholders' Perception, Expectations, and Satisfaction**

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2.0   The EFQM Model Execution.
Criterion 5 Driving Performance & Transformation Continued.
5.2 Transform the Organization for the Future.

Clause 6.2 of BMS75k directs us about Business Objectives and Plans which is an essential solution to Transform the Organization for the Future. This has already been used in a solution for Engaging Stakeholders under Criterion 3 which is also an important consideration when considering and preparing for the Company's future.

These objectives shape the direction the Company is going to take, and as such, these values are attributes that must be reflected in the Company's strategic plans and in its business objectives which requires the Company to select them for each future level of management or individual department and their collective interest. The selection and promotion of such objectives have to be recorded as a controlled business record and must be:

a)   In keeping with Business Policy
b)   Suitable, calculable, appropriate, and time based
c)   Responsive in addressing stakeholders' concerns and requests
d)   Measured and the results collected, analyzed, and made available,
e)   Published in an understandable fashion,
f)   Changed when required after thorough technical evaluation
g)   Reviewed to identify opportunities for improvement potential and
h)   Used for the purpose of business development

The Company must complete and maintain a controlled business record of the current objectives and the results obtained. The practices for business objectives and plans must be the subject of a documented practice. Additional solutions are available from the following sub-clauses:

6.2.1   **Business Objectives**
6.2.2   **Business Plans**
6.2.3   **Business Analysis and Planning**
6.2.4   **Market Analysis and Planning**
6.2.5   **Sales Forecasting and Realization**
6.2.6   **Financial Analysis and Planning**
6.2.7   **Budget Management and Cost Control**
6.2.7.1 **Budget Management**
6.2.7.2 **Cost Control**

Sub-Clause 6.2.1 of BMS75k requires the Company to consider the selection and promotion of its Business Objectives when seeking the solution to Transform the Organization for the Future. The Executive Management must ensure that business objectives, including those needed to meet requirements for the Company's goods or services, are established at relevant functions and levels within the Company. The business objectives must be measurable, consistent, and traceable to directives within the Company Business Policy.

Each business objective must have a clearly defined target which must be suitable, measurable, achievable, and time-based. Objectives are used to monitor and check each principal activity that is core to the operation and continuation of the Company. These core business objectives must be used to measure the correctness and timeliness of the process involved and their activity.

Each objective must be identified with its process and constituents as a reporting item within the Company's continuous improvement plan. Objectives must be recognized and referred to in the process effectiveness evaluation reports as a controlled business record.

Sub-Clause 6.2.2 of BMS75k requires the Company to consider our Business Plans when seeking the solution to Transform the Organization for the Future. The Executive Management must produce, review, and authorize the Company's Strategic Business Plan to host and communicate the Company's future strategic objectives and intentions. Additional Business Plans (Sub-Layer) for departments and operations used in the company can be used to communicate sections of the Strategic Plan. These cannot promote objectives that are not contained or supportive of the Strategic Business Plan.

The Company Strategic Business Plan must be documented and controlled as a master document, authorized only by Executive Management for communication within the Company. The Strategic Business Plan contains its business activities:

a)   Scope of the plan and its application within the Company,
b)   Statement of the Company activities, management structure, and markets **(See 5.0)**.
c)   Current situation of the Company and its business activities **(See 6.0)**
d)   Business risks and opportunities **(See 6.1)**
e)   Company's future objectives and goals **(See 6.2)**
f)   Resource details and future requirements **(See 7.1)**
g)   Principle Operational Planning and Control Details **(See 8.1)**
h)   Current Business Performance Evaluation **(See 9.1)**
i)   Company performance and plans for improvement **(See 10.0)**

All Business Plans are documented and recognized as a controlled business record. Objectives and performance must be communicated and planned to the greatest practical extent in measurable quantities, time-based and financial terms.

The Business Plans must also be reviewed as directed by the output from analysis and planning and revised only after thorough traceable technical analysis and evaluation.

> *Note:*   *The Company Business plans, and planning covered in clauses 6.2.3 to 6.2.7 inclusive, can contain or refer to, all relevant management matters, sub-plans, and reports. The documented practice or its equivalent method is also contained in these subjects when appropriate.*

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2.0   The EFQM Model Execution.
Criterion 5 Driving Performance & Transformation
5.2 Transform the Organization for the Future Continued.

Sub-Clause 6.2.3 of BMS75k requires the Company to use Business Analysis and Planning when seeking the solution to Transform the Organization for the Future. The Company must provide for the analysis and planning of all business activities with which to document, maintain and conform to its Business Plan. The Company must assess, analyze, and record the current situation of business activities and update the Business Plans as directed by the Business Program.

Business analysis can be used to identify where in the future the Company can improve the business activities detailed in the Business Plans, by greater utilization of available resources. Analysis determines the optimum level and compares the current utilization of finance, capacity, resources, processes, and markets available to the Company and those which are currently in use. Improvements can include:

   a)   Reducing waste,
   b)   Creating solutions,
   c)   Completing projects,
   d)   Improving efficiency,
   e)   Documenting the right requirements
   f)   Achieving the agreed targets.

The analysis must be completed in a timely fashion and results reported at specified intervals during the Business Program. The directives of the 5As can be applied to the Business Plans through traceable technical analysis, directed at realizing the strategic goals and objectives set out in the Strategic Business Plan. The planning used can assess the resources and methods required in addition to those currently in use, that are needed to achieve the Company's goals and objectives. This can include improving both efficiency and effectiveness of the documented Business Management System. Business Analysis Plans are to be documented and recognized as a controlled business record.

Sub-Clause 6.2.4 of BMS75k requires the Company to use Market Analysis and Planning when seeking the solution to Transform the Organization for the Future. The Company must complete a market analysis to determine the current opportunities, strengths, weaknesses, and threats of the Company and the business in which it is engaged. The output from the analysis must be documented and include as appropriate:

   a)   Market size (current and future)
   b)   Market growth rate
   c)   Market profitability
   d)   Industry cost structure
   e)   Distribution channels
   f)   Market trends
   g)   Key success factors
   h)   Key success Details

Market analysis determines the market risk for the Company and the current opportunities. The market analysis must be documented and contain an investigation of the markets in which the Company conducts business or is planning to intervene with a business project. This market analysis can then be used to direct the Company's planning activities to inform the decision on matters related to the expansion or contraction of business activities.

The activities include inventory, purchase, work force, facility expansion, acquisition of capital equipment, process, goods and service development, and other business matters. It should be incorporated and referenced in the Strategic Business Plan and recognized as a controlled business record.

Sub-Clause 6.2.5 of BMS75k requires the Company to use Sales Forecasting and Realization when seeking the solution to Transform the Organization for the Future. Here we seek to forecast and produce a sales prediction and a Business Plan, for the period of the Strategic Business Plan**.** The sales forecasts are based on market analysis and are recognized as a controlled business record.

Realization of sales during the period of the Business Plan must be measured against the forecasts and reported. Action can then be taken when negative values are registered against those forecast or planned. The Sales Forecasts Business Plan will be incorporated or referenced in the Strategic Business Plan**.**

Sub-Clause 6.2.6 of BMS75k requires the Company to use Financial Analysis and Planning when seeking the solution to Transform the Organization for the Future. The Company must analyze available data and information from the current business activities for the finance produced and required for business activities. This covers the period of the Strategic Business Plan and seeks to identify records and communicate in financial terms, the consequences of the proposals made by the market analysis and sales forecasting.

The Company must produce a Financial Business Plan as a product of the financial analysis which is based on the results of current known and historical business activities together with an informed forecast of the impact of the strategic objectives and goals. This is documented in financial and time-related terms with details of future requirements for finance, capacity, resources, processes, goods, and services with comparisons for those currently in use. The financial plan contains:

   a)   Company's business situation analysis
   b)   Evaluation of options and alternatives
   c)   Budget planning, targets, and income statements.
   d)   Financial control and costs forecasts, analysis of variance and profit performance.

The planning used must assess the resources and methods required in addition to those currently in use, to achieve the Company's goals and objectives improving both efficiency and effectiveness of the Documented Business Management System.

The Financial plan must list the assigned authorities allocated a budget **(See 6.2.7)** and state the budget apportioned to each authority including the expenditure and the contribution required from each assigned authority's activities to the income forecast.

The financial plan can be incorporated or referenced in the Strategic Business Plan and is recognized as a controlled business record.

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         5.2 Transform the Organization for the Future Continued.

Sub-Clause 6.2.7 of BMS75k requires the Company to use Budget Management and Cost Control when seeking the solution to Transform the Organization for the Future. Each assigned authority listed in the financial plan must have sufficient resources with which to commence and complete its activities in a timely fashion. They must be apportioned a budget and not exceed the expenditure assigned to their operations as detailed and provided for in the financial plan. Both the expenditure and income realized must be controlled and reviewed at planned intervals as part of the Business Program.

Finance can be allocated in an annual budget, to each assigned authority by the use of the Company's financial management systems and processes. These must be used to communicate the provisions in the financial plan and for the achievement of the Strategic Plan. Each assigned authority must be allocated a budget and must be authorized to manage its resources within the budget's financial limitation. The management of the budget is required to:

   a)   Ensure the efficient and effective use of resources
   b)   Make sound business decisions
   c)   Demonstrate accountability
   d)   Take remedial action where needed

Measurements taken against budgets can be used for tracking resource utilization and effective use of resources and finance. The financial plan produced for the period of the Strategic Plan must list the assigned authorities and the budgets specified in annual proportions, considering core expenditure by each assigned authority for the year, with due consideration for:

   e)   Assigned authority's strategy for the year and how financial resources must be deployed to deliver the strategy.
   f)   Operational and Company considerations such as income targets and the agreed expenditure cap
   g)   Existing expenditure commitments (i.e., recurrent staff costs, ongoing research, and development, etc.)
   h)   Prioritization of activities in the assigned authorities' area of activity.

Budgets must be reviewed at frequencies planned within the Business Program and include assessments for plan steering. Budgets must only be changed or amended after thorough technical and informed evaluation. When amendments to current and future budgets are required, the following considerations must be applied:

   i)   The use of reserves
   j)   Under-spends and overspends in the assigned budget
   k)   Under-spends and overspends by other authorities
   l)   Carry forward and surplus balances
   m)   Implications for the financial plan
   n)   Implications for the Strategic Plan.
   o)   Corrective measures required to maintain the Strategic Plan
   p)   Preventive measures required
   q)   The risk associated with the proposed action
   r)   Consequences of no action being taken

When budget variations have been authorized there must be formal evidence recorded by the assigned authority**.** This will be held within the authority for potential review by Auditors or other stakeholders as a controlled business record in the event of a query**.** In such circumstances, the original budget value must be left in place to aid future expenditure planning and to highlight where variances have arisen.

Regular monitoring and reporting of expenditures must be completed by each assigned authority and reviewed against the budgets agreed upon. This verifies expenditure against budgets and identifies changing patterns or circumstances that need corrective action. Each assigned authority is required to apply a documented cost control practice which must define the responsibilities and requirements for planning and conducting budget reviews, establishing records, and reporting results. The reviews control expenditures by monitoring progress against budget items and objectives at planned intervals (monthly, quarterly, and annually). In addition, there must be appropriate reporting, and authorization mechanisms to control expenditure within the Company. This can include:

   s)   Budget for the area of activity for the full year and expenditure profiled for the year to date (See Note 1)
   t)   Future expenditure commitments
   u)   Balance of annual budget remaining. (See Note 2)
   v)   Forecast outturn. (See Note 3)
   w)   Analysis and explanation of any positive or negative variances

   Note 1   *When profiling the budget, planned expenditure patterns should be considered.*

   Note 2   *When actual expenditure and commitments together are compared to the full-year budget, this should indicate the balance of the budget remaining at the review point.*

   Note 3   *Forecast out-turn is the expected position against budget at the end of the year after taking into account all anticipated expenditures. The forecast outturn may not be equal to the original budget*

The monitoring of expenditure against budget must be undertaken at an overall level by the Business Management Representative based on reports and data provided by each assigned authority who must undertake a review at a more detailed level. The Business Management Representative and the assigned authorities must complete a cost control review to monitor expenditure, income, and budgets at specified intervals and frequencies.

The cost control review scope, frequency, and methods must be defined, planned, and integrated into the Business Program. The frequency and scope of the review must take into consideration the status and importance of the expenditure or income, the processes being financed, and its significance in the Strategic Plan as well as the results of previous cost control reviews and their achievement of budget directives.

The conduct of reviews must ensure objectivity and impartiality of the cost control process. Assigned authorities must produce the reports and data for review but not review their work. Records of the review and its results together with any actions identified must be recorded and identified as a controlled business record.

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         Criterion 5 Driving Performance & Transformation
         5.2 Transform the Organization for the Future Continued.

Clause 6.4 of BMS75k requires the Company to consider the Management of Change when seeking the solution to Transform the Organization for the Future. In this respect, the Company is required to develop and maintain a documented practice to manage indigenous, foreseeable, and unforeseeable changes needed to improve, direct or accommodate a change in the Company Business Management System and Business Objectives.

The documented practice must cover indigenous changes arising from the operation of the Business Management System, which present changes needed to compliment, advance, or be advantageous to the Business Management System and the Company's core purposes and interests. This document practice must also contain a prescription for the identification and monitoring of known external matters which affect the Company's current interests or operations over which it has no direct control but will maintain the knowledge and intelligence needed to recognize when there is movement in direction or occurrence. The prescription must set out a standard practice to recognize when known external matters require changes to be made within our business activities.

The documented practice also contains a prescription to recognize the occurrence of unforeseeable events which impose a change on the Company's Business Management System or its agreed objectives. These unforeseeable matters cannot be anticipated or planned for because they are:

   a)   Beyond the realm of regular plausible expectations,
   b)   Beyond the Company's influence to control or prevent,
   c)   Explanations for changes or direction can only be made after the event,
   d)   Only rationalized by way of hindsight.

When changes to the Business Management System are required due to indigenous, foreseeable, or unforeseeable events, their introduction must be authorized at the appropriate level, planned, recorded, and communicated. All changes to the Business Management System must be introduced under a controlled management practice and only proceed after completing a thorough and full technical evaluation of the known and foreseeable events and consequences resulting from the change.

Changes must be communicated to all effected or interested parties and functions, to prevent inconsistency between policy, procedure, practice, and record. This ensures the integrity of the Business Management System is always maintained, for control and continuity of the Company objectives and purpose.

Accountability for all change results, and decisions, must be determined and recorded to ensure all matters are traceable to the authorities tasked with the decisions made, and that decisions made are always defendable and tractable to the records and information available at the time of a decision, and on which decisions were reached.

Completion of a change to the Business Management System must be incorporated into the company practices for configuration control and reflected in the build standards for the products and services provided. Records must be produced and maintained of all change management decisions and recognized as a controlled business record.

Sub-Clause 6.4.1 of BMS75k about the management of change is all about Indigenous Change Preparation and Management when seeking the solution to Transform the Organization for the Future. The management of change documented practice must specify the planned and continuous assessment and review of the Business Activity, with an evaluation of its Business Management System and related processes to determine compliance and correctness of the Business Management System with this Business Management Standard or if changes are required. These changes can include as appropriate:

   a)   Changes to Business Practices and Company Structure.
   b)   Changes in Policy and Responsibility.
   c)   Changes to Procedures or Documented Practices.
   d)   Changes derived from Audits, Checks, and Reviews.
   e)   Improvement Management Plans.

Indigenous change planning and preparation must be applied to matters over which the Company has the most control and influence. This includes:

   f)   Change in the scope of the Business Management System.
   g)   Policy changes or amendments.
   h)   Product and service change.
   i)   Process change.
   j)   Procedure change.
   k)   Change in Employees' skills and know-how.
   l)   Change in Management style and structure.
   m)   Changes in capacity and output.

All indigenous changes to the Business Management System must be authorized at the appropriate level, evaluated as suitable and appropriate, and registered in a revision under the established and documented configuration control practices.

Sub-Clause 6.4.2 of BMS75k concerning the management of change is all about External Change Preparation and Management when seeking the solution to Transform the Organization for the Future. The Company must determine the extent to which all foreseeable changes in known external matters can affect its own planned objectives and current business program.

Each assigned authority must become conversant with the sources, consequences, and influence of such matters, and provide for their mitigation by way of contingencies within their contributions to the Company strategic plan. This is incorporated and completed as part of our business practices for risk management.

The Company identifies the relevance and degree to which any external activity affects its practices and objectives. This includes the degree to which the subject influences, benefits, or detracts from the current business program and the strategic plan.

The Management of Change documented practice must include the recognition of external subjects that require the Company to have knowledge and intelligence of their stability, constancy, or volitivity and the subsequent consequence and relationship to the Company's business objectives.

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2.0   **The EFQM Model Execution.**
Criterion 5 Driving Performance & Transformation
5.2 Transform the Organization for the Future Continued.

Sub-Clause 6.4.2 of BMS75k requires the selection and monitoring of all known relative external subjects and issues to be determined by their relationship with the Company objectives or the degree to which their conduct and passage can compromise an aspect of the Business Management System. Changes in these issues and the need for action depend on:

a)   Relationship of the issue to a company objective or practice,
b)   The extent to which changes require adjustments to internal company matters,
c)   Changes being within the realm of regular plausible expectations,
d)   An internal ability to accommodate. influence or prevent detriment,
e)   An internal ability to realize a benefit from a change or development,
f)   Change frequency, predictability, or likelihood,
g)   Know-how and intelligence of the scope and boundary of the issue,
h)   Degree and extent to which mitigation methods can be applied,
i)   The strategic decision to act when limits have been reached or exceeded.

The Company should recognize at the earliest posable stage when an external matter or occurrence impacts the Business Management System. Consideration must be given to the event which must be recorded and registered. The register of these events can be used to record all relative matters which have a known influence on the realization of Business Objectives and impact on the Business Management System. This register must be maintained as a controlled business record.

A review of all registered matters must be provided for within the company Business Program**.** The degree to which these matters influence the selections of business objectives and the planned action required for their mitigation must be a subject in the risk management systems program.

Sub-Clause 6.4.3 of BMS75k is critically one of the most important requirements involved in a solution to Transform the Organization for the Future. This covers Planning and Accommodating Unforeseen Issues which the Company recognizes and identifies as unforeseen issues, consisting of events and occasions that impact the Business Management System and objectives, at the earliest posable stage. Unforeseen external issues can only be deemed to be unforeseeable when the issue impacts significantly and directly on the planned arrangements of the business, and are proven to be:

a)   Beyond the realm of regular plausible expectations,
b)   Beyond the Company's influence to control or prevent,
c)   Explanations for conduct or direction can only be made after the event,
d)   Only rationalized by way of hindsight,
e)   Its influence on company interests was not a reasonable conclusion.

The Company must determine the extent to which all these unforeseeable issues affect its planned business program and core purpose. Each assigned authority must become conversant with the issue, and prepare recommendations for subsequent consideration, approval, and authorization at an appropriate level.

Their identification, analysis, and assessment commence with acknowledging the relevance of an unforeseen external event, and provision for addressing its implications has been provided, within the business program. The review of relative unforeseeable issues can include:

f)   Adequacy of current political risk and other relative insurance,
g)   Supply chain and logistical operations,
h)   Finance liquidity, banking strategy, and access to domestic currency,
i)   Tailoring the nature of the business to the nature of the risk, and specifics of the market.
j)   Regular advice and consultation from informed authorities,

The unforeseen external issue includes maters arising from local, domestic, national, and international events and impositions which prevent or interfere with the current company Business Program including changes in:

k)   Culture and convention expectations and compliance,
l)   Statutory and legislative requirements and stipulations,
m)   Government and religion expectations and compliance,
n)   Alignment of business risk and challenges with the strategic plan,
o)   Conduct and integrity of business activity in global operations.

Note 1: *Matters and decisions taken outside of the Company by National and International Authorities can have an impact or influence on the ability of the Company to realize its business objectives. These are identified as Exogenous or External Issues typical examples are the application of taxes or tariffs on the goods or services that a Company produces, purchases, or provides.*

Note 2: *There is no universal solution to situations when national or international political risks start interfering with business plans. Risk management in general is a very sensitive and complex concept that requires a unique approach to every single issue.*

Note 3: *Political risk insurance can be considered for the protection of businesses and international companies that operate within developing economies. Provision exists in such arrangements for protection in the event of acts of expropriation, political unrest and violence, war and terrorism, capital repatriation, and sovereign debt default.*

Note 4: *Supply chain considerations in single-sourced arrangements can expose a business activity to detriments which include increased tariffs, trade bans, and delivery delays.*

Note 5: *Consultation authorities can include Chambers of Commerce, Embassy Trade Counters, Credit &   International Business Association, Globe Risk International, Multilateral Investment Guarantee Agency,*

Note 6: *Unforeseeable issues are those events or occasions that have occurred which are outside of the scope of the Company Business Management System, but are having, or going to have an effect or influence on the Company objectives*.

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2.0   The EFQM Model Execution.
Criterion 5 Driving Performance & Transformation Continued.
5.3 Drive Innovation & Utilize Technology

The European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition is very concerned with the correctness and management of change which it maintains all companies and organizations must have to face in ever-increasing frequencies, implications, size, and velocity. All leading organizations must have to acknowledge that their Key Stakeholder needs and expectations change and generate change over time, so it is important to collect and analyze feedback from all quarters to improve or change the current products, services, and solutions. Customers expect innovation in both the products the Company produce and the services it delivers so the technology used needs to be correctly and effectively organized to take charge of driving innovation and increasing business value.

In Driving Innovation & Utilizing Technology a Company can be significant with ground-breaking discoveries and changes. They are good news for any organization, but the Company cannot expect these to present themselves daily. Innovation is normally a result of small but significant improvements that have a major impact on customers' and other stakeholders' expectations. Innovation in daily activities has to flow at every level in the management hierarchy, down from executive investment and upwards from employee identification with their involvement in products, processes, and technology. In addition, there are constant changes inside (Indigenous) and outside (External) the organization that needs to be managed in parallel if the Company is going to be successful in new business.

EFQM2022 defines the management of change as an approach for leading the transition of individuals, teams, and organizations from their current state to a defined desired future state. It is an Organisational process aimed at helping those stakeholders affected by the change to understand, accept, and embrace it.

Clause 6.4 of BMS75k discussed in connection with a solution to Transform the Organization for the Future is equally relevant to Driving Innovation & Utilizing Technology. In this respect, the Company develops and maintains a documented practice to manage indigenous, foreseeable, and unforeseeable changes needed to improve, direct, or accommodate a change in the Business Management System and Business Objectives. Indigenous changes arising from the operation of the Business Management System, which present changes needed to complement, advance, or are advantageous to the Business Management System and the Company's core purposes and interests. The ability to anticipate and accommodate external changes is also imperative to the solution for Driving Performance & Transformation by Driving Innovation & Utilizing Technology. There is also the need to recognize unforeseeable changes at the earliest possible stage so contingency preparations can be called into play.

Research and Development Business Activities have been discussed in detail regarding the solutions for Direction with Criterion 2 requirements under 2.3 which calls the Company to Enable Creativity & Innovation. The European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition requires a Company to foster creativity and innovation whereas 5.3 of EFQM 2020 calls it to Drive Innovation & Utilize Technology. By having a solution in a documented Business Management System, the Company can accommodate and address both the enabling and driving of innovation and the technology which creates and hosts it for good business practice and purpose.

The Business Management System defines creativity as an ability to move away from current rules, methods, and relationships to generate ideas for new or improved processes, products, services, solutions, systems, or social interactions. Innovation is a practical translation of ideas into new or existing products, services, solutions, processes, systems, organizational structures, or social interactions. Effectively directing a company to progress by using and encouraging imagination and new ideas in all strata of the management and workforce from the executive down to the executioner.

Clause 8.3 of BMS75k hosts the solution for Driving Innovation & Utilizing Technology which covers the subject of Research and Development and contains the following:

8.3	**Research and Development Business Activities**
8.3.1	**Research Business Activities**
8.3.2	**Development Business Activities**
8.3.3	**Research and Development Planning**
8.3.3.1	**Research and Development Authorization**
8.3.3.2	**Research and Development Project Plan**
8.3.3.3	**Commercialization Strategy**
8.3.4	**Research and Development Projects**
8.3.5	**Research and Development Inputs**
8.3.6	**Research and Development Outputs**
8.3.7	**Research and Development Results and Records**
8.3.8	**Research and Development Assessment**
8.3.9	**Research and Development Accountability**

BMS75k requires the Company, to address and document requirements and objectives for research and development identified within the Strategic Business Plan, as a principal business activity.

As a solution to Driving Innovation & Utilizing Technology, the practices for Research and Development must anticipate, assess, accommodate, analyze, and account for innovation and the technology used per the orientation of the business, its technology, range of goods and services, and the experience of the assigned research and development authorities at the disposal of the Company.

By Driving Innovation & Utilizing Technology the Company is directed to document the research and development business practices to include the research and evaluation of innovative and new developments as well as the replacements for current goods and services we provide and the requirement for new goods and services developments required to realize the sales and marketing objectives.

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Criterion 5 Driving Performance & Transformation
5.3 Drive Innovation & Utilize Technology Continued.

Sub-clause 8.3.4 of BMS75k calls on Research and Development Projects to be used to drive innovation and utilize technology. Projects for research and development must be registered and authorized for which a plan and prescription must be determined and approved. Projects must be used to drive innovation and utilize technology and include the research and evaluation of innovative and new developments, replacements for current goods and services, and the planned development of new goods and services required to realize the sales and marketing objectives. The type of project adopted is identified from one of four recognized classifications:

a) **Pure Business Research**   consists of experiments and speculative business work authorized for acquiring new knowledge without long-term benefits focused principally on acquiring business knowledge or know-how.

b) **Strategic Business Research**   directed into specified areas to explore useful discoveries and provide a broad base of knowledge necessary for developing a solution to recognized practical problems.

c) **Applied Business Research**   for a specific application to determine uses for the findings of basic research or to determine new ways of achieving some specific and predetermined objectives.

d) **Experimental Business Development**   to extend knowledge gained from research or business experience to create new business activities or improved goods and practices.

The Company must determine a research and development documented practice to define the levels and scope of authorization required for each of the above research and development project categories.

Sub-clause 8.3.6 of BMS75k lays down the requirements for a solution in the Research and Development Outputs used to drive innovation and utilize technology. Business research and development output consist of a completed research and development plan and prescription containing the following information as a product or result of the development business activities:

a)   Research and development project review records
b)   Scope, range, and results of the research and development work completed to date
c)   Commercialization Strategy/ Rational/Market Requirements
d)   Other important financial data and considerations that need to be communicated

The design and selection prescription is provided by the development business activity consisting of the detailed specification for the design and selection business activity to undertake. This prescription drives innovation and utilizes technology containing as a minimum:

e)   Scope and description of design and selection work requirements and disciplines
f)   Known Statutory and Legislative Considerations
g)   Experience from similar development projects
h)   Pass Fail Criteria (Test and Inspection Expected Results)
i)   Metrics for test and inspection equipment and resources
j)   Requirements for any special processes
k)   Baseline configurations relative to existing products
l)   Outline and references for master records index
m)   Nominations for manufacturing solutions
n)   Identification of specialist skills and techniques
o)   Make or buy considerations
p)   Requirements for high-level assemblies' hierarchy
q)   Critical component details and nominations
r)   Preservation and packaging considerations
s)   Requirements for user documentation and manuals
t)   Design and selection program and time scales
u)   Other design and selection considerations

The above documents can provide for verification that the products and services produced must meet the research and development statement of needs and other documented requirements which drives innovation and utilizes the available technology.

The design and selection prescription must contain a list of critical aspects of development that if changed, would invalidate the test results, and necessitate a re-test. This must consist of a record of key characteristics, and specific actions to be taken to consistently produce the same aspect of the product and service and must be recognized as a controlled business record.

> *Note:*   *Design disciplines can consist of a dedicated design function such as IT, Electrical, Mechanical, Cosmetic, Fabric, and similar vocations or collectively such as Production, Logistic, Process, Publicity, or Distribution.*

Sub-clause 8.3.7 of BMS75k lays down the requirements for the Research and Development Results and Records which the Company must use to drive and validate innovation and utilize technology. All records produced by business activities and projects must be determined and recognized as controlled business records. As a minimum, these consist of:

a)   Register of research activities and interests
b)   Development specification
c)   Research and development project plan
d)   Research and development project review records
e)   Design and selection prescriptions
f)   Research and development assessment record

Each of the above records must be identified and traceable to an authority responsible for its review and approval for subsequent use and retention as a business record. All documents must be identified and controlled by documented configuration control practices.

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2.0   The EFQM Model Execution.
Criterion 5 Driving Performance & Transformation Continued.
5.4 Leverage Data, Information & Knowledge.

The European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition concerns itself with the correctness and management of change which is made much easier through the correct assembly and use of data and knowledge. In facing the need for change sound record keeping and use of correct data to control and force performance and transformation is expected.

To remain successful, the combination of Driving Performance & Transformation confirms the necessity for us to deliver for today while preparing for the future which requires two forms of improvements, continuous and radical. The ever-increasing importance of data, information & knowledge is a major element in enabling performance & transformation.

The availability of information for analysis is considered in the quest to reach higher performance goals. In addition, we anticipate and consider the risks that can hinder our achievements. To see how to provide an informed position on which to make decisions we must look to our collective knowledge and experience to improve performance and that of our stakeholders. We must also accept that business activities can have a positive impact not only on the purpose it was designed for but on other needs that may follow from it.

Information and data for analysis can provide insight that enables us to see the inter-relationships between disparate parts of the business because the outcome of a decision becomes the source of information for another decision, bringing and increasing the asset of intelligence to the company.

Clause 7.5 in BMS75k lays down the specification and requirements for Documented Information which starts the solution to providing Leverage Data, Information & Knowledge. The documented Business Management System will consist of:

    a)   Business Management System Policy and Manual, **(See 5.4.1 and 5.2)**
    b)   Administrative procedures
    c)   Documented practices **(See 5.4.2)**
    d)   Task instructions
    e)   Work instructions
    f)   Business Management System Records. **(See 7.5.3.2)**.
    g)   Information specified as being required by this Business Management System Standard
    h)   Information considered necessary for the effectiveness and organization of the Business Management System

The above documents must be in a form that provides access, filing, and retrieval by all registered interested parties and those authorized with the management of the task and its administration. When creating and updating Business Management System documents or information and records, the Company must ensure:

    i)   Unique identification to ensure two or more authorities in a different location can determine they are referring to the same information.
    j)   Placement, hosting, and recovery of documents and information
    k)   Language, interpretation, and translation
    l)   Security and prevention from unintended use
    m) Retention and review for legibility, suitability, and adequacy
    n)   Configuration control to connect the subject, occasion and the information produced.

Documents and information must be reviewed upon completion and approved as adequate, having considered all the above requirements before placement. The authority responsible for the review must be identified and recorded as a controlled business record.

Documents, records, and information produced from the operation of the Business Management System and by this Business Management Standard are all subject to configuration control and must be given a unique identification. The Company must demonstrate effective management and control of all Business Management System documents and information which includes:

    o)   Correct use and publication (Controlled and Uncontrolled Release)
    p)   Authorities for access, research, selection, amendment, or removal
    q)   Stewardship of content and integrity, including deployment and retrieval
    r)   Information preservation and legibility
    s)   Change management and control
    t)   Adoption, status, assignment, retention, obsolescence, and archive
    u)   Correct and accurate configuration

The Company must decide on the provisions for permanent access, control, and management of external documents, information, data, and records which are necessary for the effective operation of the Business Management System. Such arrangements include provision for control by the originators or the issuing authorities who have the property in such information and records and for the Company to be recognized as a notifiable party.

Sub-Clause 7.5.3.1 in BMS75k specifies what is needed for Document and Data Control and how documents and data are controlled in a documented practice. The practice must detail how the Company:

    a)   Document provenance is related to which product, service, or business activity
    b)   Document configuration relates to which product, service, or occasion,
    c)   Documents approval is given before issue,
    d)   Document changes are identified, approved, and authorized,
    e)   Revision history and improvement details are recorded,
    f)   The frequency and scope of reviews are identified,
    g)   Retention periods, archive arrangements, and means of disposal are specified,
    h)   Parties are to be notified when changes are known and registered.

In considering the archive and disposal arrangement, all authorities requiring notification of changes must be consulted and their requirements accommodated and communicated for appropriate action. Configuration control must be used to relate to the subject, occasion, and the information disposed of or archived.

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2.0   The EFQM Model Execution.
Criterion 5 Driving Performance & Transformation.
5.4 Leverage Data, Information & Knowledge Continued.

Sub Clause 7.5.3.2 of BMS75k addresses the important issue of the Control of Business Records and requires that Business Records be completed and recognized as confirming that the specified requirements of the Business Management System and its effective operation have been achieved. Where the term "Business Record" appears within the standard, the Company must provide a documented record to be retained for a specified period.

The Company must produce a Business Record documented practice to define the controls needed for the identification, storage, protection, retrieval, retention, and disposition of all business records. Configuration control must also be used to relate the business record with the product, service, practice, subject, occasion, or decision and the information the record contains. All Business Records must be accessible, readable, correctly controlled, and traceable to the subject matter they address when retrieved. The Business Management Representative is required to maintain and operate a Business Record Register from which to allocate record identifications and record the locations, record authority, current issue, and revision of all business records. The register must also be recognized as a business record.

NOTE 1:   *Access to information can be at various stages of authority ranging from having sight of documents only, or the authority to revise or remove. This should be evident from business records or a statement in the document in question.*

NOTE 2:   *The records specified as being required to evidence compliance with the Business Management Standard BMS75000:2020 and must be available for both reference and review are listed as an appendix in the Business Management System Manual.*

2.0   The EFQM Model Execution.
Criterion 5 Driving Performance & Transformation Continued.
5.5 Manage Assets & Resources
The European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition sights Assets and Resource Management as a requirement in Driving Performance & Transformation. Maximizing the use of what assets exist and having available resources as and when requirements arise, is the essence of good and effective process management.

Section 7 of BMS75000:2020 Business Management Standard is dedicated to the subject of support and contains Clause 7.1 which provides specification and direction in respect of the following:

7.1	**Resources**
7.1.1	**Resource Requirement Identification**
7.1.2	**Provision of Resources**
7.1.3	**Premises Infrastructure and Working Environment**
7.1.4	**Occupational Health and Safety**
7.1.5	**Measurement Facilities and Equipment**
7.1.6	**Human Resources**

This provides the Company with advice and instruction on the solution to the management of resources and assets.

Clause 7.1 of BMS75k discusses the acquisition and deployment of a resource. It requires that the Company anticipate, assess, accommodate, analyze, and account for all resource requirements needed for each business activity and the period of the Strategic Plan, including human resources. These resources must be adequately financed by the Company from provisions within the financial plan and allocated to assigned authorities for the achievement of their objectives and goals as detailed in the Strategic Plan.

Sub Clause 7.1.1 of BMS75k instructs the Company about Resource Requirement Identification and instructs it to determine the required resources, including the finance needed for the implementation and improvement of the Business Management System which is also recognized as a resource. This must be directed at fulfilling stakeholder expectations and requirements. For each business activity considered, engaged, or undertaken, the resource requirements and timeliness must be anticipated, assessed, accommodated, analyzed, and accounted for, to provide completion of each business activity as well as those required for the period of the Strategic Plan. This must be defined and recorded as a controlled business record.

Sub Clause 7.1.2 of BMS75k directs the Company on the Provision of Resources and requires us to provide for their availability which must be identified within the Strategic Plan together with those resources that have a direct impact on the correctness and timely completion of an approved and authorized business activity. The timely availability of resources must be recognized as a priority for the Business Plans and a principal contributor to the success of each business activity. These include:

a) Infrastructure
b) Human resources, workforce skills, and vocations
c) Capability, competence, and knowhow of the human resources
d) Finance and cash-flow
e) Access to the Business Records
f) Working Environment and Social Welfare
g) Capital and Investment
h) Income and Expenditure

The Company must provide and maintain the facilities required to achieve and operate an effective Business Management System which also includes:

i) Workspace and associated facilities
j) Human resource instruction and training
k) Plant, machines, equipment, tooling, hardware, and software.
l) Supporting management services.
m) Accurate and correct information
n) Intellectual property, Know-how, and experience
o) Provision and channels of communication
p) Means and methods by which to identify and report incorrectness
q) Records and methods by which product and service integrity can be confirmed
r) Empowerment at appropriate levels to correct deficiencies or errors

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2.0   **The EFQM Model Execution.**
Criterion 5 Driving Performance & Transformation
5.5 Manage Assets & Resources Continued.

Sub Clause 7.1.3 of BMS75k directs the Company about matters relating to Premises Infrastructure and Working Environment. The Company must recognize that the working environment, premises, and infrastructure all contribute to sound decision-making and excellence in operational performance. Factors that contribute to correctness and timeliness in business activity and conduct must be determined and controlled. These include cleanliness, security, and protection for employees, customers, and all other visitors.

Sub Clause 7.1.4 of BMS75k insists the Company on matters relating to Occupational Health and Safety. The Company is required to install and operate in all areas and branches an Occupational Health and Safety program for employees to practice the control and mitigation of all foreseeable Occupational Health and Safety risks that are inherent in our processes and practices. The program should consist of:

a)   Establish practices to eliminate or minimize risks to personnel and other parties who can be exposed to hazards from our business activities.
b)   Implement, maintain, and continually improve the practices and practices established.
c)   Conformance to a published and understood Occupational Health and Safety policy.

The Company must conform to the Occupational Health and Safety provisions and practices established by:

d)   Making a self-determination and self-declaration,
e)   Seeking confirmation of conformance by stakeholders
f)   Seeking confirmation of its self-declaration by an external qualified authority

The extent of Occupational Health and Safety practices, and what practices are applied, depends on the business activities, the range, and diversity of the stakeholders, technology, and the risks and complexity of the Company operations.

> *Note:*   *For guidance on establishing and maintaining an Occupational Health and Safety system, we refer to ISO45000 the International Standard for Occupational Health and Safety Management Requirements.*

Sub Clause 7.1.5 of BMS75k contains instructions on the management of Measurement Facilities and Equipment. The Company must establish, implement and maintain practices to monitor and measure the performance of each business activity on a regular and planned basis. Where appropriate, the practice to be used for monitoring and measurement must be proven against known results before use, to provide for:

a)   Measurement of business activity, process, and goods/service against the relative plans, appropriate to our needs and orientation,
b)   Monitoring of the extent to which our business objectives are met,
c)   Monitoring the effectiveness of the business documented practices and their specified controls,
d)   Proactive measurement of performance to monitor conformance with the business plans,
e)   Reactive measures of performance to monitor failings and shortfalls or other historical evidence of deficient business performance,
f)   Recording of data and results of monitoring and measurement sufficient to facilitate subsequent corrective action and preventive action analysis.

When the results are dependent on equipment or software to monitor or measure business performance, the Company must establish and maintain documented practices for the proving and validation of such equipment, as appropriate. Records of business performance measuring equipment and software validation results are retained as a controlled business record.

Sub Clause 7.1.6 of BMS75k provides direction on Human Resources. Here we ensure that employees or any person under our control who is contributing to business activity, are competent in completing assigned tasks based on appropriate education, training, or experience for which training and experience records of employees or any person under the Company's control must be completed as a controlled business record.

The Company must identify employee needs associated with the Business Management System and provide advice, instruction, and training to be given to nominated employees in the subjects which the standard prescribes to each vocation and ability needed. The action taken must be defined and recorded to evaluate its effectiveness as a controlled business record.

The Company must also establish, implement, and maintain documented practices to make persons working under its control aware of:

a)   The consequences, actual or potential, of their work activities,
b)   Their contribution to business outcomes,
c)   Requirements for conduct and behavior,
d)   Benefits to be derived from training and improved personal performance.
e)   Their roles and responsibilities
f)   The importance of conforming with our policy and practices and to the requirements of the Business Management System,
g)   The risks involved in not fulfilling the specified practices and requirements.

The documented practice used, must consider differing levels of responsibility, ability, language, skills, literacy, and risks in which the person is engaged or to which they are to be assigned. Where appropriate, the authority responsible for human resources will be required to produce the details needed for the human resource and welfare content of the Strategic Plan. This can be included in the Strategic Plan or contained in a separate Human Resource and Welfare Business Plan, which is referred to in the Strategic Plan.

The assigned authority for Human Resources will be responsible for the development and implementation of the documented practices which need to detail the reporting and achievement of the Strategic Plans personnel and human resource aspect and objectives.

A Human Resource and Welfare Review must be a planned item listed in the Business Program. This review must be undertaken, recorded, and reported as a controlled business record.

The achievement of the Strategic Plans for human resources and welfare aspects and objectives must also be reviewed at planned intervals by the Business Management Representative. The review criteria, scope, frequency, and methods must be defined in the documented practice and reflected in the Business Program.

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2.0   The EFQM Model Results

Criterion 6: Stakeholder Perceptions

The European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition moves from its direction of execution under Criterion 5 to the Direction of Results under Criterion 6. This is significant because Criterions 6 and 7 contribute under a different point-scoring practice.

EFQM 2020 Revised 2ⁿᵈ Edition	**BMS75000:2020 Business Management Standard**
2 The EFQM Model Direction	**1.0** Scope
Criterion 1: Purpose, Vision & Strategy **(C1)**	**4.1** Understanding the Company and its Relations
Criterion 2: Organizational Culture & Leadership Execution **(C2)**	**5.0** Governance and Commitment
Criterion 3: Engaging Stakeholders **(C3)**	**4.2** Understanding the Needs and Expectations of Interested Parties
Criterion 4: Creating Sustainable Value **(C4)**	**8.0** Business Operation
Criterion 5: Driving Performance & Transformation Results **(C5)**	**9.0** Business Performance Evaluation
Criterion 6: Stakeholder Perceptions **(C6)**	**9.1** Monitoring, Measurement, Analysis, and Evaluation
Criterion 7: Strategic & Operational Performance **(C7)**	**6.0** Business Planning

The EFQM 2020 positioning statement insists that what we have achieved against what has been described in the "**Direction & Execution Sections"**, includes the forecast for the future. In practice, we find that as an outstanding organization we would provide results data for:

- Stakeholder Perceptions
- Creating Sustainable Value
- Driving Performance & Transformation

EFQM Criterion 6 directs the Company to make provision for the results of Stakeholder Perceptions. Its Positioning statement requires the Company to concentrate on results based on feedback from Key Stakeholders and their personal experiences of dealing with our organization and their perceptions. These perceptions could relate to past as well as current Key Stakeholders and could be obtained from several sources, including

a)   surveys,
b)   focus groups,
c)   ratings,
d)   press or social media,
e)   external recognition,
f)   advocacy,
g)   structured review meetings,
h)   investor reports and
i)   compliments/ complaints,

These can include feedback compiled by customer relationship management teams. In addition to the perceptions that a Key Stakeholder may have of the Company organization based on personal experiences, perceptions are also shaped by the environmental and social impact reputation of the Company and its organization can include the degree to which the Company is perceived by our Key Stakeholders as contributing successfully to one or more of the United Nations Sustainable Development Goals and Global Compact ambitions.

Under **"Criterion 3"** there is a clear linkage between how the Company executes its Stakeholder's Strategy and the Perceptions of the Stakeholder Groups that it serves **(Criterion 6)**. The weighting factor decided by the Company executives applied for each of the five different Stakeholder Groups has been set in Criterion 3 and mirrored in Criterion 6. As an outstanding organization, the Company finds that in practice it must:

- **Know how successful we are** at executing a Strategy to meet the needs and expectations of our Key Stakeholders.

- **Use analysis of past and current performance** to predict future performance.

- **Use Key Stakeholder Perception Results** to stay informed and influence the current Direction and the Execution of our Strategy

EFQM 2020 insists that all leading organizations must acknowledge that Key Stakeholder needs may change over time and that it is important to collect and analyze feedback to improve or change our products, services, and solutions. These present themselves as constant changes inside and outside the Company that needs to be managed in parallel if it is to remain successful and in business.

Again, the Company will need to ensure it has both a constant and a radical program for improvements to remain active and profitable in business. The solution to these Stakeholder Perception problems can be found in the following sections and clauses of the BMS75000:2020 Business Management Standard:

4.0	**Context of the Business**
4.1	**Understanding the Company and its Relations**
4.2	**Understanding the Needs and Expectations of Interested Parties**
4.2.1	**General**
4.2.2	**Legal and Regulatory Requirements**
4.2.3	**Identification of Business Stakeholders**
4.2.4	**Customer Responsibility and Focus**
8.8	**External Business Operational Influences**
8.8.1	**Determining External Business Operational Influences**
8.8.2	**Monitoring External Business Operational Influences**
9.0	**Business Performance Evaluation**
9.1	**Monitoring, Measurement, Analysis, and Evaluation**
9.1.1	**Monitoring and Measurement of Processes**
9.1.2	**Monitoring and Measurement of Goods and Services**
9.1.3	**Shareholder Perception Evaluation**
9.1.4	**Customer Satisfaction and Perception Evaluation**
9.1.5	**Employee Perception Evaluation**
9.1.6	**Supplier Perception Evaluation**
9.1.7	**Stakeholders' Perception, Expectations, and Satisfaction**

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Criterion 6: Stakeholder Perceptions Continued

The solution for engaging stakeholders has already been completed under Criterion 3.

Criterion 3. Engaging Stakeholders

3.1	**Customers:**	Build Sustainable Relationships
3.2	**People:**	Attract, Engage, Develop & Retain
3.3	**Business & Governing Stakeholders:**	Secure & Sustain Ongoing Support
3.4	**Society:**	Contribute to Development, Well-Being & Prosperity
3.5	**Partners & Suppliers:**	Build Relationships & Ensure Support for Creating Sustainable

Under this directive in Criterion 6, the Company must use these solutions and know how successful it has been in executing a Strategy to meet the needs and expectations of its Key Stakeholders. To achieve this, the Company must use analysis of past and current performance to predict its future performance and use its Key Stakeholder Perception Results to stay informed and to influence the current Direction and the Execution of its Strategy.

Because the solution for engaging stakeholders has found solutions in section 4 of the BMS75000:2020 Business Management Standards I am going to concentrate on the collection and analysis of results to find the solutions for criterion 6. Here we are well served by **Section 9 of the BMS75k** Standard which contains

9.0	**Business Performance Evaluation**
9.1	**Monitoring, Measurement, Analysis, and Evaluation**
9.1.1	**Monitoring and Measurement of Processes**
9.1.2	**Monitoring and Measurement of Goods and Services**
9.1.3	**Shareholder Perception Evaluation**
9.1.4	**Customer Satisfaction and Perception Evaluation**
9.1.5	**Employee Perception Evaluation**
9.1.6	**Supplier Perception Evaluation**
9.1.7	**Stakeholders' Perception, Expectations, and Satisfaction**

Clause 9.0 of BMS75k contains instructions for the Business Performance to be evaluated. It requires the Company to review the performance of the Business Activities against the Strategic Business Plan at planned intervals under a documented practice and the provisions of the Business Program. The review must include:

a)   Strategic Business Plan and its relevance to current activities.
b)   Effectiveness of Sub-layer Business Plans and the reported achievements.
c)   Business Program and its contents.
d)   Results taken from monitoring, measurement, analysis, and evaluation of business performance.
e)   Results and information derived from Internal Management Audits.
f)   Actions arising from management reviews.
g)   The actions that were taken to address risks and opportunities.

The Company must test and report on the effectiveness of:

h)   Risk identification and management
i)   Make or buy decisions and their analysis
j)   Research and development activities
k)   Design and selection activities
l)   Project management planning and achievements
m) Process planning, management, and control
n)   Outsourcing and subcontract planning
o)   Goods and service planning
p)   Business analysis and planning
q)   Market analysis and planning
r)   Sales forecasting and realization.
s)   Financial analysis and planning
t)   Budget management and cost control

Based on the above, the Company can then review:

u)   Current business objectives and the effectiveness of plans to achieve them
v)   Changes to the Strategic and Sub-layer Business Plans
w) Proposed changes to the Business Objectives and Goals
x)   Plans and Provisions for Business Continuity

In determining and evaluating the effectiveness of the business activities and practices, the Company must take into account of the timeliness at which tasks and reports are completed, and their accuracy when compared against plans and objectives to which they relate or contribute. Records of the review must be maintained and recognized as a controlled business record.

Clause 9.1 of BMS75k provides direction on Monitoring, Measurement, Analysis, and Evaluation. The Company must determine requirements for monitoring, measurement, analysis, and evaluation of each business activity that contributes to the effectiveness of the Strategic Business Plan and the Business Program. Requirements for business activity verification activities, instructions, plans, and records must be determined. Business activity performance and the effectiveness of the Business Management System must be assessed from the results produced and action taken to direct changes when such results identify variations with the Strategic Business Plan and Sub-Layer Business Plans.

Records of monitoring, measurement, analysis and evaluation of the business performance must be maintained and recognized as a controlled business record.

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2.0   The EFQM Model Results
         Criterion 6: Stakeholder Perceptions Continued

Clause 9.1.1 of BMS75k provides direction on Monitoring and Measurement of the Business Process and requires the Company to plan and carry out business activities and processes under controlled conditions. Controlled conditions include:

a)   Availability of information that describes the business activities and processes.
b)   Availability and use of business activities and processes monitoring and measuring programs.
c)   Implementation of business activities and processes monitoring and measurement plans and programs.
d)   Compliance with documented business practices, activities, or their equivalents.
e)   Implementation of business activities and practice post-completion assessments and reviews.

Accountability for the review of all business activities and practice achievements and difficulties must be defined and assigned to competent personnel with adequate resources which include:

f)   Establishing, implementing, and maintaining processes to manage critical events and stages.
g)   Development and identification of variable data controls and reviews.
h)   Selection and decisions using alternative consideration practices.
i)   Identifying in-process verification and reportable events when adequate verification of conformance cannot be performed at a later stage.

The Company must validate any documented practices and business activities whose results cannot be verified by subsequent monitoring or measurement. This includes any processes where deficiencies and omissions only become apparent after the product of the activity is in use or has been completed and communicated. Validation of business practices and activities must demonstrate the ability of these business processes to achieve planned results. The Company must establish under a documented practice arrangements for validation of business activities including:

j)   Defined criteria for review and approval of the business processes,
k)   Approval of programs, equipment, and qualification of personnel,
l)   Use of experience, specific methods, documented practices, and know-how,
m) Requirements for reviews and records
n)   Requirements and criteria for revalidation.

Records of monitoring, measurement, analysis, and evaluation of the business processes must be maintained and recognized as a controlled business record.

Clause 9.1.2 of BMS75k provides direction on the Monitoring and Measurement of Goods and Services. The Company is required to monitor and measure the characteristics of the goods and services provided by way of its business activities and verify that specified requirements have been met. This must be carried out at appropriate stages of the product realization and service delivery process following the planned arrangements. Measurement requirements for acceptance and confirmation must be documented in a documented practice and include:

a)   Criteria for acceptance and/or rejection,
b)   Where in the sequence, measurement and testing operations are performed,
c)   Required records of the measurement and testing results (at a minimum, an indication of acceptance or reject),
d)   Any specific measurement instruments or techniques required, and any specific instructions associated with their use.

When critical items, including key characteristics, have been identified, the Company must ensure they are controlled and monitored by proven methods. Sampling inspection may be used as a means of acceptance provided a sampling plan has been applied with recognized statistical principles and proven as appropriate for use. Where required to demonstrate product or service qualification, the Company must ensure that records provide evidence that these meet the defined requirements.

The release of goods and service delivery to the customer must not proceed until the planned arrangements have been satisfactorily completed, unless otherwise agreed with the relevant authority and, where applicable, by the customer. Where goods are released for production or services are deployed pending completion of all planned or required measurement and monitoring activities, a practice of positive recall must be applied if verification reveals benign failures due to errors or omissions.

Records must be maintained for positive recall purposes that indicate the identification and location of the goods and services, and the person(s) authorizing the release of goods or deployment of the service. These records relating to positive recall provision must be recognized as a controlled business records.

The Company must ensure that all documents required to accompany the goods or service are present and suitable for the intended use. Such documents provide evidence of goods and services' conformity with the acceptance criteria specified and must be maintained and recognized as a controlled business record.

Clause 9.1.3 of BMS75k provides the Company with direction and instruction on Shareholder Perception Evaluation. The Company must anticipate, assess, accommodate, analyze, and account for shareholder perception of its business activities, conduct, and performance. The methods for obtaining and using this information must be determined under a documented practice. Executive Management must be informed as to the perception of its shareholders and is accountable for Company performance and Corporate Governance practices. Shareholder involvement must be encouraged by ensuring effective and timely communication is demonstrated with shareholders which include:

a)   Ensuring that senior management has in place both a prevention and reaction strategy
b)   The shareholder base is known and who are the active mainstream investors
c)   Share holder concerns and issues are known and dealt with effectively and timely
d)   Company performance is assessed against competitors by use of key metrics
e)   Communication with shareholders is effective
f)   Key priorities of management, realistic benchmarks, and milestones reflect the concerns and expectations of all shareholders.

Analysis of shareholder perception should be by way of proven methods and use where possible, independent, and external means of collection and identification of data to compare with known shareholder expectations. Records produced and maintained for monitoring, measurement, analysis, and evaluation of shareholder perception must be recognized as a controlled business records.

> *Note: Guidance on corporate governance management systems can be taken from ISO 31000 and ISO 22301*

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Criterion 6: Stakeholder Perceptions Continued

Clause 9.1.4 of BMS75k provides direction and instruction on Customer Satisfaction and Perception Evaluation. The performance of the Business Management System, in respect of the Company's obligation to its customers. This must be monitored from the collection and analysis of information relating to customer perception as to whether the Company has met customer requirements. The methods for obtaining and using this information must be determined under a documented practice. Information to be monitored and used for the evaluation of customer satisfaction includes, but is not limited to,

   a)   Goods and service conformity,
   b)   On-time delivery performance,
   c)   Customer complaints and
   d)   Corrective action requests.

The Company is required to develop and implement plans for customer satisfaction improvement that address deficiencies identified by these evaluations and assess the effectiveness of the results. Monitoring customer perception should include obtaining input from customers as well as analysis of existing indigenous data derived from the business activities of the Company.

Records produced and maintained for monitoring, measurement, analysis, and evaluation of customer satisfaction and perceptions must be recognized as a controlled business record.

Clause 9.1.5 of BMS75k provides direction and instruction on Employee Perception Evaluations. The performance of the Business Management System, in respect of the Company's obligation to its employees, must be monitored from the collection and analysis of information relating to employee perception. This must determine if the Company is a good employer and offers secure competitive employment and opportunities that met employee expectations and requirements.

The methods for obtaining and using this information must be determined under a documented practice and include:

   a)   Assessment of prospective employee expectations and requirements at the point of engagement,
   b)   Annual reviews of employee performance, training, and improvements
   c)   Review of employee satisfaction/dissatisfaction with terms and conditions of employment at the point of termination or retirement.

The Company must develop and implement plans for employee perception improvement that address deficiencies identified by these evaluations and assess the effectiveness of the results. Information to be monitored and used for the evaluation of employee perception includes, but is not limited to,

   d)   Care and welfare
   e)   Knowledge and identity with the organization's business goals and objectives
   f)   Pride in the job and the product or service of the business activities
   g)   The remoteness of management and its understanding of employee concerns and issues at all levels
   h)   The ability for employees to communicate with management
   i)   The ease by which employees can assess themselves and their development in the organization
   j)   The need to correct poor performance, and bad behavior
   k)   Motivation and incentive

Monitoring employee perception includes obtaining input from employees as well as analysis of existing indigenous data derived from the business activities of the Company. Records produced and maintained for monitoring, measurement, analysis, and evaluation of employee perception must be recognized as a controlled business records.

Clause 9.1.6 of BMS75k provides direction and instruction on Supplier Perception Evaluation. The performance of the Business Management System, in respect of the organization's obligation to its suppliers, must be monitored from the collection and analysis of information relating to supplier perception as to whether the Company is a good customer and offers fare and acceptable terms and conditions under which it can trade.

The methods for obtaining and using this information must be determined under a documented practice and include data relating to:

   a)   Suppliers' delivery and quality performance against contracts placed.
   b)   Acceptability of the organization's terms and conditions of contract.
   c)   Response and acceptance of complaints raised.
   d)   Corrective action requests.
   e)   Suppliers' identity with the organization's goals and objectives.

The Company must develop and implement plans for supplier's perception improvement that address deficiencies identified by these evaluations and assess the effectiveness of the results. Monitoring supplier perception includes obtaining input from suppliers as well as analysis of existing indigenous data derived from the business activities. Records produced and maintained for monitoring, measurement, analysis, and evaluation of supplier perception must be recognized as a controlled business records.

Clause 9.1.7 of BMS75k provides direction on other Stakeholders' Perceptions, Expectations, and Satisfaction. The performance of the Business Management System, in respect of the Company's obligation to its stakeholders must be monitored and reviewed. This can be from the collection and analysis of information relating to stakeholder perception assessed by use of the Company's internal measures and actual perceptions provided by the stakeholders themselves which are compared with those of other organizations.

The methods for obtaining and using this information must be determined under a documented practice. The Company shall develop and implement plans for stakeholder perception improvement that address deficiencies identified by these evaluations and assess the effectiveness of the results. Monitoring stakeholder perception must include obtaining input from external parties as well as analysis of existing indigenous data derived from the business activities of the Company.

Records produced and maintained for monitoring, measurement, analysis, and evaluation of stakeholder perception must be recognized as a controlled business records.

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2.0   **The EFQM Model Results**

Criterion 6: Stakeholder Perceptions Continued

Additional support and direction are available for Engaging Stakeholders and Building Sustainable Customer Relationships from

4.5	**External Business Considerations**
6.1.6	**Goods and Service Planning Analysis and Reviews**
8.1.3	**Customer Services and Support**
8.2	**Customer-Related Business Activities**
8.2.1	**Determination of Requirements**
8.2.2	**Review of Requirements**
8.2.3	**Review of Requirement Applications and Use**
8.2.4	**Customer Use Lifecycle Support and Provision.**
8.2.5	**Customer Communication**
8.6.5	**Customer Property**

2.0   **The EFQM Model Results Continued**

Criterion 7: Strategic & Operational Performance.

The European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition position on Strategic & Operational Performance concentrates on results linked to the Companies performance in terms of:

a)   The ability to fulfill its Purpose.
b)   Deliver the Strategy.
c)   Create Sustainable Value.
d)   Its fitness for the future.

The results should be used by the Company to monitor, understand, and improve its overall performance and to forecast the impact this performance must have on both the perceptions of its Key Stakeholders as well as its future strategic ambitions. Practically EFQM 2020 expects an outstanding organization to:

e)   Use both financial and non-financial indicators to help it measure its Strategic and Operational Performance.
f)   Understand the linkages between Key Stakeholder Perceptions and actual performance
g)   Predict, with a high degree of certainty, how future performance must evolve.
h)   Consider the current and future needs and expectations of its Key Stakeholders
i)   Use information when deciding on the most appropriate performance indicators to match its Strategic & Operational objectives.
j)   Understands the cause-and-effect relationships that impact performance
k)   Uses the results achieved to stay informed and influence its current Direction & Execution.
l)   Uses the results currently being achieved to forecast its future performance with an expected degree of certainty.

Strategic and Operational Performance indicators should include the reported results and forecasts to show how well the Company is achieving its strategic goals and the reported indicators and forecasts used to show how well it is achieving its operational targets. These indicators should include,

m)   Achievements in delivering its Purpose and Creating Sustainable Value
n)   Financial Performance
o)   Fulfillment of Key Stakeholder's Expectations
p)   Achievement of Strategic Objectives
q)   Achievements in Driving Performance
r)   Achievements in Driving Transformation
s)   Predictive Measures for the Future.

The Business Management Standard BMS75000:2020 offers the following solutions to these requirements:

2.0   **The EFQM Model Results**

Criterion 7: Strategic & Operational Performance Continued.
Achievements in delivering the company's Purpose and Creating Sustainable Value (7.1).

Section 8 containing Clause 8.0-8.8 of BMS75k provides the prime solutions to Achievements in delivering the Company Purpose and Creating Sustainable Value. These have already been detailed in connection with **Criterion 4** for designing the value and how it is created.

Clause 8.0 in BMS75k directs the Company to identify the operational processes with which to manage the operational business activities stated in the Strategic Plan. These processes must be controlled and documented to the greatest practical extent in process plans, documented practices, task instructions, and work instructions, for consistency in operations and to communicate requirements to operational or service delivery departments and authorities.

The requirements for each operational process must include those needed for

a)	Commencing the process	(Inputs)
b)	Activities involved in the process	(Practices)
c)	Product of the process	(Outputs) and

In addition, the Company must produce the means to measure the timeliness, quantity, and quality of the product of the processes at each stage in its sequence.

Note1:   *Each process shall normally only have a single product but may depend on numerous inputs and contain several activities in sequences that must follow a defined route. Such multi-dependent activities when documented are referred to as a Process Plan.*

Note2:   *Where the Business activity technology or orientation is labor intensive, provision for a separate section in the strategic plan can be given over to Human Resources although the contribution of human resources and requirements for skills and know-how is considered as part of the duties and responsibilities of the vocational subject sections.*

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Criterion 7: Strategic & Operational Performance
Achievements in delivering the Companies Purpose and Creating Sustainable Value *(7.1)* Continued.

Clause 8.1 of BMS75k addresses the subject of Operational Planning and Control which is essential if the Company intends to plan, implement, monitor, and control each of the operational processes and business activities identified in the Strategic Plan. This is achieved by:

a)   Determining and communicating the criteria for the operational business activities and their processes in a Business Plan,
b)   Implementing control of the business processes by monitoring business activities and performance within the Business Plans provisions,
c)   Completing and retaining records necessary to demonstrate that the business processes have been carried out as planned.

Management of all intended changes in each business process must be planned and reviewed to the greatest practical extent so that the consequences of any unintended changes or detriments are removed**.** All risks identified because of operational processes and changes to planned requirements must be managed under the provisions and practices detailed in **Clause 6.1.1 of the BMS75k Standard** covering Risk Management.

Changes to planned requirements must only be actioned after completing a thorough technical and comprehensive review and evaluation of the changes intended and their impact on the business activities of the company and all interested parties and stakeholders. The review, evaluation, and consequences of each change must be determined and recorded as a controlled business record.

2.0   The EFQM Model Results
Criterion 7: Strategic & Operational Performance Continued
Financial Performance *(7.2)*

Sub-Clause 8.1.1 of BMS75k covers the Financial Administration and Accounts requirements which provide direction in the solution for achieving and maintaining Financial Performance. This provides the Financial Administration and Accounts solution to the delivery of value and requires the finance and accounts assigned authority to produce the details needed for the financial content of the Strategic Plan.

The finance and accounts assigned authority is responsible for the development and implementation of documented practices that detail the reporting and achievement of the Strategic Plan's financial aspect and objectives. The achievement of the Strategic Plans financial aspect and objectives must be reviewed at planned intervals by the Business Management Representative. The review criteria, scope, frequency, and methods will be defined in the documented practice and reflected in the Business Program. Under the Business Program, a Financial Review must be planned, undertaken, recorded, and reported as a controlled business record.

2.0   The EFQM Model Results
Criterion 7: Strategic & Operational Performance Continued
Fulfillment of Key Stakeholder's Expectations *(7.3)*

Clause 4.1, 4.2.3, and 9.1.7 of BMS75k provide the solution to the Fulfilment of Key Stakeholders' Expectations.

Clause 4.1 of BMS75k covers the understanding and identification of the Company and its Relations. The Company is directed to identify and register external and internal authorities and matters that relate to its activities or influence its ability to achieve the planned objectives of its Business Management System. It requires the Company to identify and register external and internal authorities and matters that relate to its activities or influence its ability to achieve the planned objectives of its Business Management System.

Sub-clause 4.2.3 of BMS75k addresses the Identification of Business Stakeholders and requires the Company to identify all stakeholders who are directly and indirectly affected by national and international groups, parties, persons, or authorities that can affect, be affected by, or perceive themselves to be affected by a decision or activity made by the Company. It must identify all direct and indirect local, national, and international authorities, that can have an effect, or be perceived to influence the Company's business activities and objectives which would be accompanied by a decision or activity they have the authority to make or create. Stakeholders can include, but are not limited to:

a)   Shareholders and Investors.
b)   Employees.
c)   Trade Unions and Collective Labor Representatives.
d)   Charities, Trustees, and Authorities.
e)   Customers and End Users.
f)   Suppliers and Sub-contractors.
g)   Trade Creditors.
h)   Credit Unions and Credit Agencies.
i)   Local, National, and International Authorities.
j)   Strategic Authorities and Professional Institutes.
k)   Statutory and Legislative Authorities.
l)   Customs, Excise, and Revenue Authorities.
m)   National Governments and Unions of Trading Nations.
n)   Banks, Credit Providers, and Other Financial Institutions.

Clause 9.1.7 of BMS75k directs the company to seek and understand stakeholders' perceptions, expectations, and satisfaction. It requires the Company to measure the performance of the Business Management System, in respect of its obligation to the stakeholders identified under clause 4.2.3. This must be from the collection and analysis of information relating to stakeholder perception assessed by the use of the Company's internal measures and perceptions provided by the stakeholders themselves. These are compared with those of other organizations when applicable.

The methods for obtaining and using this information must be determined under a documented practice. The Company must also develop and implement plans for stakeholder perception improvement that address deficiencies identified by these evaluations and assess the effectiveness of the results.

Monitoring stakeholder perception must include obtaining input from external parties as well as analysis of existing indigenous data derived from the business activities of the Company. Records produced and maintained for monitoring, measurement, analysis, and evaluation of stakeholder perception are recognized as a controlled business records.

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2.0   The EFQM Model Results
Criterion 7:   Strategic & Operational Performance Continued
Achievement of Strategic Objectives (7.4)

Clause 6.2 of BMS75k provides the solution to the Achievement of Strategic Objectives by addressing and directing the requirements for Business Objectives and Plans. This has already been used in a solution for Engaging Stakeholders under Criterion 3 which is also an important consideration when preparing for the Company's future.

These objectives shape the direction the Company is going towards, by the achievement of its strategic objectives, and as such, are attributes that must be reflected in the Company's strategic plans. This requires the Company to consider the selection and promotion of its Business Objectives when seeking the solution to Transform the Organization for the Future.

Executive Management must ensure that business objectives, including those needed to meet requirements for the Company's goods or services, are established at relevant functions and levels within the Company. The business objectives must be measurable, consistent, and traceable to directives within the Company Business Policy with clearly defined targets which must be suitable, measurable, and achievable as well as time-based. Each objective must be identified with its process and constituent a reporting item within the Company's continuous improvement plan. Objectives will be recognized and referred to in the process effectiveness evaluation reports as a controlled business record.

Business Plans play an important part in the Achievement of Strategic Objectives and provide the solution to Transform the Organization for the Future. The Executive Management must produce, review, and authorize the Company's Strategic Business Plan to host and communicate the Company's future strategic objectives and intentions.

Additional Business Plans (Sub-Layer) for departments and operations used in the company to communicate sections of the Strategic Plan must be supportive of the Strategic Plan because these cannot promote objectives that are not contained or supportive of the Strategic Business Plan. The Company Strategic Business Plan must be documented and controlled as a master document, authorized only by Executive Management for communication within the Company.

All Business Plans must be documented and recognized as a controlled business record. Objectives and performance must be communicated and planned to the greatest practical extent in measurable quantities, time-based and financial terms. The Business Plans themselves must be reviewed as directed by the output from analysis and planning and revised only after thorough traceable technical analysis and evaluation.

> *Note:*   *The Company Business plans, and planning covered in clauses 6.2.3 to 6.2.7 inclusive, can contain or refer to, all relevant management matters, sub-plans, and reports. The documented practice or its equivalent method is also contained in these subjects when appropriate.*

This requires the Company to use Business Analysis and Planning when seeking to confirm the Achievement of Strategic Objectives both current and for the future because the Company must provide for the analysis and planning of all business activities with which to document, maintain and conform to a Business Plan.

The business analysis must also be used to identify where in the future the Company can improve the business activities detailed in the Business Plans, by greater utilization of available resources. Analysis determines the optimum level and compares the current utilization of finance, capacity, resources, processes, and markets available to the Company and those which are currently in use.

The analysis must be completed in a timely fashion and results reported at specified intervals during the Business Program. The directives of the 5As can be applied to the Business Plans through traceable technical analysis, directed at realizing the strategic goals and objectives set out in the Strategic Business Plan. The planning used must assess the resources and methods required in addition to those currently in use, that are needed to achieve the Company's goals and objectives. This can include improving both efficiency and effectiveness of the documented Business Management System. Business Analysis Plans must be documented and recognized as a controlled business record. The Company should also use Market Analysis and Planning when seeking the Achievement of Strategic Objectives and complete a market analysis to determine the current opportunities, strengths, weaknesses, and threats to the Company and the business in which it is engaged. The output from the analysis must be documented and include as appropriate:

a)   Market size (current and future)
b)   Market growth rate
c)   Market profitability
d)   Industry cost structure
e)   Distribution channels
f)   Market trends
g)   Key success factors
h)   Key success Details

Market analysis determines the market risk for the Company and the current opportunities. The market analysis must be documented and contain an investigation of the markets in which the Company conducts business or is planning to intervene with a business project.

When seeking the Achievement of Strategic Objectives regular monitoring and reporting of expenditures must be completed by each assigned authority and reviewed against the budgets agreed upon. This verifies expenditure against budgets and identifies changing patterns or circumstances that need corrective action. Each assigned authority must apply a documented cost control practice that defines the responsibilities and requirements for planning and conducting budget reviews, establishing records, and reporting results. The reviews will control expenditure by monitoring progress against budget items and objectives at planned intervals (monthly, quarterly, and annually) against which, appropriate reporting and authorization mechanisms will control expenditure within the Company.

Seeking the Achievement of Strategic Objectives must be supported by the monitoring of expenditure against budget and should be undertaken at an overall level by the Business Management Representative based on reports and data provided by each assigned authority who undertakes a review at a more detailed level. The Business Management Representative and the assigned authorities must complete a cost control review to monitor expenditure, income, and budgets when seeking the Achievement of Strategic Objectives.

The cost control review scope, frequency, and methods must be defined, planned, and integrated into the Business Program. The frequency and scope of the review can take into consideration the status and importance of the expenditure or income, the processes being financed, and its significance in the Strategic Plan as well as the results of previous cost control reviews and their achievement of budget directives. The conduct of reviews must ensure objectivity and impartiality of the cost control process. Assigned authorities will produce the reports and data for review but must not review their work. Records of the review and its results together with any actions identified must be recorded and identified as a controlled business record.

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2.0   The EFQM Model Results
Criterion 7: Strategic & Operational Performance Continued
Achievement in Driving Performance *(7.5)*

Section 9, Clause 9.0, and Clause 9.1 of BMS75k provide the solution to determining the Achievement in Driving Performance. These direct and require the Company to review the performance of the Business Activities against the Strategic Business Plan at planned intervals under a documented practice and the provisions of the Business Program. The review must include:

a)   Strategic Business Plan and its relevance to current activities.
b)   Effectiveness of Sub-layer Business Plans and the reported achievements.
c)   Business Program and its contents.
d)   Results are taken from monitoring, measurement, analysis, and evaluation of business performance.
e)   Results and information derived from Internal Management Audits.
f)   Actions arising from management reviews.
g)   Actions used to address risks and opportunities.

The Company is required to test and report on the effectiveness of:

h)   Risk identification and management
i)   Make or buy decisions and their analysis
j)   Research and development activities
k)   Design and selection activities
l)   Project management planning and achievements
m) Process planning, management, and control
n)   Outsourcing and subcontract planning
o)   Goods and service planning
p)   Business analysis and planning
q)   Market analysis and planning
r)   Sales forecasting and realization
s)   Financial analysis and planning
t)   Budget management and cost control

Based on the above, the Company must review:

u)   Current business objectives and the effectiveness of plans to achieve them
v)   Changes to the Strategic and Sub-layer Business Plans
w)   Proposed changes to the Business Objectives and Goals
x)   Plans and Provisions for Business Continuity

In determining and evaluating the effectiveness of the business activities and practices, account must be taken of the timeliness at which tasks and reports are completed, and their accuracy when compared against plans and objectives to which they relate or contribute. Records of the review must be maintained and recognized as a controlled business record.

2.0   The EFQM Model Results
Criterion 7: Strategic & Operational Performance Continued
Achievement in Driving Transformation *(7.6)*

Clause 9.1 of BMS75k provides support for the solution for determining the Achievement in Driving transformations but addresses the solution to Achievement in Driving Transformation. It requires the Company to determine the needs for monitoring, measurement, analysis, and evaluation of each business activity that contributes to the effectiveness of the Strategic Business Plan and the Business Program. Requirements for business activity verification activities, instructions, plans, and records must be determined and include:

a)   What business practices require monitoring, measurement, analysis, and evaluation
b)   What business practices incorporate their own explicit self-assessment and examination
c)   What business practices require or would benefit from impartial assessment and verification
d)   What verification practices and stages in Business Program must provide the required business information
e)   Availability of suitable instruction and information that describes the verification tasks,
f)   Benefits to be derived from having work instructions and task instructions with expected results,
g)   Provision and use of suitable equipment, knowledge, and informed external advice or instruction,
h)   Use of available internal and external verification resources,
i)   Result assessment and criteria for adjustments, acceptance, and rejection
j)   Accountability for business activity records and use of information in related decisions
k)   Decision integrity and prevention of contamination by incorrect results and records being used,
l)   Evidence of the use of accurate information and business standards
m) Appropriate control over misinterpretation of information and data supplied.
n)   Availability and access to know-how and lessons learned
o)   Reference to and deployment of business excellence standards,
p)   How to replicate and repeat correct business activity decision-making,
q)   Verification of business decision correctness if queries are raised at the latter stages
r)   Appropriate verification records, result from retention and provenance with the business activities assessed.

Business activity performance and the effectiveness of the Business Management System must be assessed from the results produced and action taken to direct changes when such results identify variations with the Strategic Business Plan and Sub-Layer Business Plans.

Records of monitoring, measurement, analysis and evaluation of the business performance must be maintained and recognized as a controlled business record.

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2.0   The EFQM Model Results
Criterion 7: Strategic & Operational Performance Continued
Achievement in Driving Transformation *(7.6)*

In addition to **Section 9 Clause 9.0 and 9.1 of BMS75k,** the achievement in driving transformation has its solutions supported in **Section 6** of the Business Management Standard BMS75000:2020 which directs the planning and the management of change. This section 6 contains the directives and requirements for the following:

6.0	**Business Planning**
6.1	**Actions to address Risks and Opportunities**
6.1.1	**Risk Identification and Management**
6.1.2	**Make or Buy Analysis and Planning**
6.1.3	**Project Management Planning**
6.1.4	**Process Planning, Management, and Control**
6.1.5	**Outsourcing and Subcontract Planning**
6.1.6	**Goods and Service Planning Analysis and Reviews**
6.2	**Business Objectives and Plans**
6.2.1	**Business Objectives**
6.2.2	**Business Plans**
6.2.3	**Business Analysis and Planning**
6.2.4	**Market Analysis and Planning**
6.2.5	**Sales Forecasting and Realization**
6.2.6	**Financial Analysis and Planning**
6.2.7	**Budget Management and Cost Control**
6.2.7.1	**Budget Management**
6.2.7.2	**Cost Control**
6.3	**Business Continuity**

Clause 6.4 of BMS75k provides the solutions for the management of change which is a prime consideration when addressing the solutions for Driving Transformation. This consists of

6.4	**Management of Change**
6.4.1	**Indigenous Change Preparation and Management,**
6.4.2	**External Change Preparation and Management,**
6.4.3	**Planning and Accommodating Unforeseen Issues,**

Clause 6.4 of BMS75k requires the Company to develop and maintain a documented practice to manage indigenous, foreseeable, and unforeseeable changes needed to improve, direct, or accommodate a change in its Business Management System and Business Objectives. The documented practice must cover indigenous changes arising from the operation of the Business Management System, which present changes needed to compliment, advance, or are advantageous to the Business Management System and the core purpose and interests of the Company**.**

This management of change document practice must also contain a prescription for the identification and monitoring of known external matters which effect the current interests or operations within the Company over which the Company has no direct control but maintains the knowledge and intelligence needed to recognize when there is movement in their direction or occurrence.

The prescription sets out a standard practice to recognize when known external matters require changes to be made within the Company activities. The documented practice shall also contain a prescription to recognize the occurrence of unforeseeable events which impose a change on the Company Business Management System or its agreed objectives. These unforeseeable matters cannot be anticipated or planned for, because they are:

a)   Beyond the realm of regular plausible expectations,
b)   Beyond the Company's influence to control or prevent,
c)   Explanations for changes or direction can only be made after the event,
d)   Only rationalized by way of hindsight.

When changes to the company's Business Management System are required due to indigenous, foreseeable, or unforeseeable events, their introduction shall be authorized at the appropriate level, planned, recorded, and communicated.

All changes to the Business Management System are introduced under a controlled management practice and shall only proceed after completing a thorough and full technical evaluation of the known and foreseeable events and consequences resulting from the change.

These changes must be communicated to all effected or interested parties and functions, to prevent inconsistency between policy, procedure, practice, and record. This ensures the integrity of the Business Management System is always maintained, for control and continuity of the Company objectives and purpose.

Accountability for all change results, and decisions, must be determined and recorded to ensure all matters are traceable to the authorities tasked with the decisions made, and that decisions made are always defendable and tractable to the records and information available at the time of a decision, and on which decisions were reached.

Completion of a change to the Business QS Management System must be incorporated into the company practices for configuration control and be reflected in the build standards for the products and services provided. Records produced and maintained of all change management decisions must be recognized as a controlled business records.

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2.0   The EFQM Model Results
Criterion 7: Strategic & Operational Performance
Achievement in Driving Transformation Continued

Clause 6.4.1 of BMS75k concentrates on Indigenous Change Preparation and Management as a solution to Achievement in Driving Transformation.

The company management of change documented practice must be directed to specify the planned and continuous assessment and review of the Business Activity, with an evaluation of its Business Management System and related processes. This must determine compliance and correctness of the Business Management System with this Business Management Standard or if changes are required.

These changes must include as appropriate:

    a)   Changes to Business Practices and Company Structure.
    b)   Changes in Policy and Responsibility.
    c)   Changes to Procedures or Documented Practices.
    d)   Changes derived from Audits, Checks, and Reviews.
    e)   Improvement Management Plans.

Indigenous change planning and preparation must be applied to matters over which the Company has the most control and influence which includes:

    f)   Change in the scope of the Business Management System.
    g)   Policy changes or amendments.
    h)   Product and service change.
    i)   Process change.
    j)   Procedure change.
    k)   Change in Employees' skills and know-how.
    l)   Change in Management style and structure.
    m)   Changes in capacity and output.

All indigenous changes to the Business Management System must be authorized at the appropriate level, evaluated as suitable and appropriate, and registered in a revision under the established and documented configuration control practices.

Clause 6.4.2 of BMS75k provides assists the solution to Achievement in Driving Transformation with direction to External Change Preparation and Management. Here the Company is directed to determine the extent to which all foreseeable changes in known external matters can affect its own planned objectives and current business program. Metrics should be established to trigger appropriate action which will be needed when changes occur.

Each assigned authority must become conversant with the sources, consequences, and influence of such matters, and provide for their mitigation by way of contingencies within their contributions to the company's strategic plan. This must be incorporated and completed as part of the Company practices for risk management.

The Company must identify the relevance and degree to which any external activity affects its practices and objectives. This must include the degree to which the subject influences, benefits, or detracts from the current business program and the strategic plan.

The Management of Change documented practice must include the recognition of external subjects that require the Company to have knowledge and intelligence of their stability, constancy, or volitivity and the subsequent consequence and relationship to the Company Objectives.

The selection and monitoring of all known relative external subjects and issues should be determined by their relationship with Company Objectives or the degree to which their conduct and passage can compromise an aspect of the Business Management System. Changes in these issues and the need for action depend on:

    a)   Relationship of the issue to a company objective or practice,
    b)   The extent to which changes require adjustments to internal company matters,
    c)   Changes being within the realm of regular plausible expectations,
    d)   An internal ability to accommodate. influence or prevent detriment,
    e)   An internal ability to realize a benefit from a change or development,
    f)   Change frequency, predictability, or likelihood,
    g)   Know-how and intelligence of the scope and boundary of the issue,
    h)   Degree and extent to which mitigation methods can be applied,
    i)   The strategic decision to act when limits have been reached or exceeded.

The Company must recognize at the earliest posable stage when an external matter or occurrence must impact the Business Management System. Consideration given to the event must be recorded and registered.

The register is used to record all relative matters which have a known influence on the realization of Business Objectives and the Business Management System. This is maintained as a controlled business record.

A review of all registered matters is provided for within the company Business Program. The degree to which these matters influence the selections of business objectives and the planned action required for their mitigation must be the subject of the company's own risk management systems.

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2.0   The EFQM Model Results
Criterion 7: Strategic & Operational Performance
Achievement in Driving Transformation (7.6) Continued

Clause 6.4.3 of BMS75k provides the solution on the Planning and Accommodating Unforeseen Issues as a solution to Achievement in Driving Transformation requiring the Company to recognize and identify unforeseen issues consisting of events and occasions that impact its Business Management System and objectives, at the earliest posable stage. Unforeseen external issues are only deemed to be unforeseeable when the issue impacts significantly and directly on the planned arrangements of the company, and are proven to be:

    a)   Beyond the realm of regular plausible expectations,
    b)   Beyond the Company's influence to control or prevent,
    c)   Explanations for conduct or direction can only be made after the event,
    d)   Only rationalized by way of hindsight,
    e)   Its influence on company interests was not a reasonable conclusion.

The Company must determine the extent to which all these unforeseeable issues affect its planned business program and core purpose. Each assigned authority should become conversant with the issue, and prepare recommendations for subsequent consideration, approval, and authorization at the appropriate level.

Their identification, analysis, and assessment commence with acknowledging the relevance of an unforeseen external event, and provision for addressing its implications has to be provided, within the business program. The review of relative unforeseeable issues must include:

    f)   Adequacy of current political risk and other relative insurance,
    g)   Supply chain and logistical operations,
    h)   Finance liquidity, banking strategy, and access to domestic currency,
    i)   Tailoring the nature of the business to the nature of the risk, and specifics of the market.
    j)   Regular advice and consultation from informed authorities,

The unforeseen external issue includes maters arising from local, domestic, national, and international events and impositions which prevent or interfere with the current company Business Program including changes in:

    k)   Culture and convention expectations and compliance,
    l)   Statutory and legislative requirements and stipulations,
    m)   Government and religion expectations and compliance,
    n)   Alignment of business risk and challenges with the strategic plan,
    o)   Conduct and integrity of business activity in global operations.

> **Note 1:** Matters and decisions taken outside of the Company by National and International Authorities can have an impact or influence on the ability of the Company to realize its business objectives. These are identified as Exogenous or External Issues typical examples are the application of taxes or tariffs on the goods or services that a Company produces, purchases, or provides.

> **Note 2:** There is no universal solution to situations when national or international political risks start interfering with business plans. Risk management in general is a very sensitive and complex concept that requires a unique approach to every single issue.

> **Note 3:** Political risk insurance can be considered for the protection of businesses and international companies that operate within developing economies. Provision exists in such arrangements for protection in the event of acts of expropriation, political unrest and violence, war and terrorism, capital repatriation, and sovereign debt default.

> **Note 4:** Supply chain considerations in single-sourced arrangements can expose a business activity to detriments which include increased tariffs, trade bans, and delivery delays.

> **Note 5:** Consultation authorities can include Chambers of Commerce, Embassy Trade Counters, Credit &   International Business Association, Globe Risk International, Multilateral Investment Guarantee Agency,

> **Note 6:** Unforeseeable issues are those events or occasions that have occurred which are outside of the scope of the Company Business Management System, but are having, or going to have an effect or influence on the Company objectives.

2.0   The EFQM Model Results
Criterion 7: Strategic & Operational Performance Continued
Predictive Measures for the Future (7.7).
The European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition position on Strategic & Operational Performance within Criterion 7 concerns itself with predicting the future and requires the Company to determine:

• Its fitness for the future.
• Uses the results currently being achieved to forecast its future performance with an expected degree of certainty.
• Predictive Measures for the Future.

This Criterion concentrates on linking the company's fitness for the future with its records of current performance. These results should be used by the organization to monitor, understand, and improve its overall performance and to forecast the impact this performance must have on both the perceptions of its Key Stakeholders as well as its future strategic ambitions.
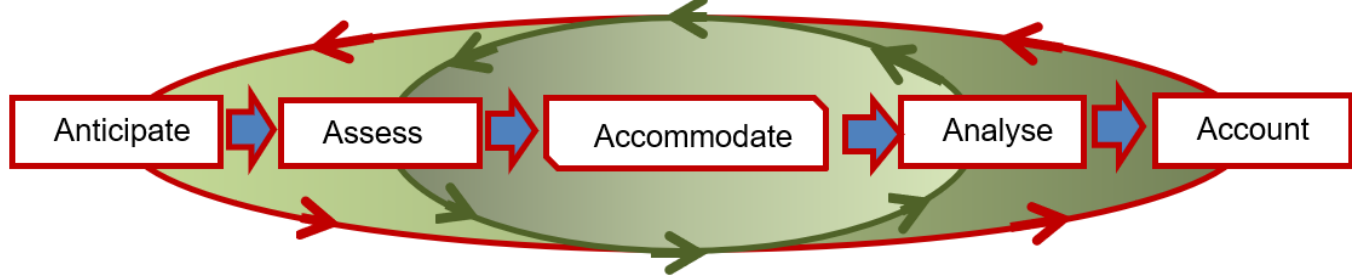
In practice, an outstanding organization must use all available indicators to help it measure its Strategic and Operational Performance by understanding the linkages between Key Stakeholder Perceptions and actual performance and its able to predict, with a high degree of certainty, how future performance must evolve.

This requires the company to stay informed and influence its current Direction & Execution using the results currently being achieved to forecast its future performance with an expected degree of certainty.

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2.0   The EFQM Model Results
Criterion 7: Strategic & Operational Performance
Predictive Measures for the Future *(7.7)* **Continued.**

The Business Management Standard BMS75000:2020 offers numerous sources of solutions to these requirements, starting with the 5As Convention, the first stage of which is to anticipate. Both the EFQM and BMS75000:2020 Business Management Standard are directed at improving the decision-making of the organization and its executives by ensuring such decisions are always made from an informed and defendable position. In this respect and with that objective, the BMS75k Management Standard promotes the convention of the 5As'

Anticipate:	The identification of risks, opportunities, trends, and life cycle stages.
Assess:	The determination of a quantified and measurable aspect or attribute.
Accommodate:	The hosting or processing resources needed to accept
Analyze	The measurement of the product of the Business Activities
Account:	The recording and stewardship of the work done.

Its prime function is to provide a system for best business practices that can support the executive decision-makers in the organization to make informed and correct decisions given the occasion and information to hand. Here the European Foundation for Quality Management 2020 (EFQM:2020) Revised 2nd Edition requirements for Predictive Measures for the Future and the directives in the BMS75000:2020 Business Management Standard come together to provide solutions for management to consider how we accommodate and benefit from future unknown events.

The BMS75000:2020 Business Management Standard directs the Company to Anticipate a broad range of subjects relevant to the business activity. When a subject change or issue is identified as relative and worthy of consideration, they must be assessed so that all business issues that are rated at an accommodating level are deemed to be inherent in the business process and as such can be sentenced as having provision already made for in the margins and contingencies the Company maintain.

Here the Company is content to observe and monitor such issues but take no additional action or make decisions that require the issue to be accommodated, further than the provisions that already exist.

Any foreseeable known matters that are inherent in a business process that could foreseeably influence the strategic business plan must be assessed, logged as an issue in the business program, and suitably sentenced as requiring additional resources to process, contain or resolve. The decision to assign an issue to the business program must be correctly informed and the authority responsible for the circumstances of the occasion must be recorded. This is required so that the event can be simulated at a later stage which may be required to support the decision as being informed and correct.

Once the issue is sentenced as relative, and significant, it needs to be included in the Business Program. The following subjects in BMS75000:2020 relate to this objective and provide solutions to the need to manage Predictive Measures for the Future.

4.0	**Context of the Business**
4.1	**Understanding the Company and its Relations**
4.2	**Understanding the Needs and Expectations of Interested Parties**
4.5	**External Business Considerations**
5.1.3	**Succession Policy and Planning**
5.4	**Documented Business Management System**
6.1	**Actions to address Risks and Opportunities**
6.1.4	**Process Planning Management and Control**
6.2	**Business Objectives and Plans**
6.2.3	**Business Analysis and Planning**
6.3	**Business Continuity**
6.4	**Management of Change**
7.2	**Competence and Capability**
7.3	**Awareness and Understanding**
7.6	**Resource and Support for External Influences**
8	**Business Operation**
8.1	**Operational Planning and Control**
8.2	**Customer-Related Business Activities**
8.2.4	**Customer Use, Lifecycle, Support, and Provision**
8.3	**Research and Development Business Activities**
8.8	**External Business Operational Influences**
8.8.1	**Determining External Business Operational Influences**
8.8.2	**Monitoring External Business Operational Influences**
9.0	**Business Performance Evaluation**
9.1	**Monitoring, Measurement, Analysis, and Evaluation**
9.1.7	**Stakeholders' Perception, Expectations, and Satisfaction**
9.3	**Management Review**
9.4	**Management of Unforeseeable Events**
10,1	**Opportunities for Improvement**
10.2.4	**Preventive Measures**
10.3	**Continual Improvement.**

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2.0   The EFQM Model Results
Criterion 7: Strategic & Operational Performance
Predictive Measures for the Future *(7.7)* Continued.

Clause 4.0 of BMS75k discusses the Context of the Business and provides support for the solution of providing predictive measures for the future. This requires the company to identify and register external and internal authorities and matters that relate to its activities or influence its ability to achieve the planned objectives of its Business Management System.

The Business Management Representative is required to register the known interest of the identified parties within the society in which the Company operates and occupies, and retain the records produced as a controlled business record. This provides a good foundation for the EFQM requirement on the information to obtain data and information on which to predict measures for future business activities.

Clause 4.1 of BMS75k directs the Company in developing an understanding of its Relations with other authorities and entities, including competitors, to provide predictive measures for the future.

Here the Company is directed to identify and register external and internal authorities and matters that relate to its activities or influence its ability to achieve the planned objectives of its Business Management System. It requires the Company to identify and register external and internal authorities and matters that relate to its activities or influence its ability to achieve the planned objectives of its Business Management System. This provides information for the EFQM requirement on which to predict measures for future business activities.

Clause 4.2 of BMS75k directs the Company to develop an understanding of the Needs and Expectations of Interested Parties which influence the selection of predictive measures for future business activities. This includes:

a)   Parties considered having interests in the Business Management System,
b)   Relevance and extent of the interest these parties are credited with,
c)   Ability, competence, and capacity available and required to achieve the requirements of identified parties.

In addition, the Company must identify and maintain a Business Record of the national and international legal and regulatory requirements that are applicable or deemed to be relative to the Company and its business activities so that changes or developments in statutory impositions can be accommodated. Compliance with the identified legal and regulatory requirements must be determined and reviewed at planned intervals. The frequency and extent of the compliance review must be recorded as an item within the Business Program.

The Company must identify all stakeholders who are directly and indirectly affected by national and international groups, parties, persons, or authorities that can affect, be affected by, or perceive themselves to be affected by a decision or activity made by the Company.

It must identify all direct and indirect local, national and international authorities, that can have an effect, or be perceived to have an effect on the Company's business activities and objectives which would be accompanied by a decision or activity they have the authority to make or create. These stakeholders can include, but not be limited to:

d)   Shareholders and Investors.
e)   Employees.
f)   Trade Unions and Collective Labor Representatives.
g)   Charities, Trustees, and Authorities.
h)   Customers and End Users
i)   Suppliers and Sub-contractors
j)   Trade Creditors
k)   Credit Unions and Credit Agencies
l)   Local, National, and International Authorities
m)   Strategic Authorities and Professional Institutes
n)   Statutory and Legislative Authorities
o)   Customs, Excise, and Revenue Authorities
p)   National Governments and Unions of Trading Nations
q)   Banks, Credit Providers, and Other Financial Institutions.

The Company is required to maintain a suitable register of all persons and stakeholders who are notifiable correspondents in the activities of the Company or have an invested interest in the operation of its business activities and operations as a controlled business record.

> *Note:*   *Communication internally enables the Company to use documented Business Management Systems whereas external communication requires different methods due to the location of the Company and the limitation of the Business Management System's scope and controls.*
> *(See Clause 7.4 Communication)*

The Company must recognize customers as stakeholders and ensure that customer requirements are determined and are met consistently, to enhance customer satisfaction with the business activities, goods, and services the Company produces distributes, provides, deploys, or is otherwise responsible for.

Executive Management must ensure that suitable measurements are taken at planned intervals to assess the perception customers have of the quality of the business activities, including the quality of the goods and services produced and the operation and processes the Company employs from a customer perspective. The Company must consult customers at planned intervals and retain a business record of customer perception**.**

Suitable and relevant objectives and measurements must be used to monitor customer satisfaction and perception of the business activities, goods, services, processes, and management conduct, employed in the operations undertaken within the Company.

Appropriate action must be taken if planned results are not achieved or will not be achieved within the timescales set. This all provides information for the EFQM requirement on which to predict measures for future business activities.

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2.0 The EFQM Model Results
Criterion 7: Strategic & Operational Performance
Predictive Measures for the Future Continued.

Clause 4.5 of BMS75k deals with the requirement for External Business Considerations which provides a procedure for the EFQM requirement on which to predict measures for future business activities. It requires the Company to identify the domestic local, national, and international constraints and boundaries by which its activities are contained, and those which its activities require permits, permission, duties, or consents, to operate within or beyond. The domestic boundaries in which the business activities can operate without consideration beyond the indigenous statutory and legislative instruments shall be defined, recorded, and reviewed at planned intervals. Where the business activities or intentions transcend the defined domestic boundaries of the business, the required permits, permission, duties, or consents, to operate and manage the business activities in such areas and locations, must be determined registered, obtained, and complied with.

The Company must demonstrate consideration has been given to its activity and intentions concerning the following as it relates to its local domestic, national, and international obligations and impositions:

- a) Culture and convention expectations and compliance,
- b) Statutory and legislative requirements and stipulations,
- c) Government and religion expectations and compliance,
- d) Alignment of business risk and challenges with the strategic plan,
- e) Conduct and integrity of business activity in global operations.

The Company must identify the relevance and degree to which its activity and intentions are affected by local, national, and international business considerations and prepare within its strategic plan for the known and foreseeable business opportunities and consequences. The consideration and preparations must be assessed, developed, and reviewed at planned intervals as part of the Business Program, for suitability and relevancy, to take account and prepare action to accommodate the known current stipulations and proposed changes.

Clause 5.1.3 of BMS75k addresses the thorny subject of Succession Policy and Planning which is a significant consideration in a solution for Future Predictive Measures and covers requirements for a Succession Policy and Plan by requiring the Company to recognize and address the need for a succession policy and plan as a controlled business record. This must include as a minimum requirement, the provision for the replacement of each assigned administrative authority and other key personnel who are core to the Business Management System and contributors to the Strategic Business Plan.

Clause 5.4 of BMS75k addresses the need for a Documented Business Management System which hosts the solution for Future Predictive Measures. This covers requirements for the Company to determine, record, operate, and continue a Business Management System and develop the effectiveness of its operations and activities by complying with the Business Management Standards specified requirements.

The documentation derived from the Business Management System must comply with customer and applicable statutory and regulatory requirements in the policies, processes, and documented practices. In this respect, we must anticipate, assess, accommodate, analyze, and account for the operation of the Business Management System. These practices must be used under the specified requirements of the Business Management Standard.
Outsourcing any practices or process that contributes to a business activity or those parties affected by our activities and operations, must comply with the provisions of the clause which covers Outsourcing and Subcontract Planning, to ensure control is maintained and effective. Principle Business Management System documentation includes:

- a) Strategic Business Plan **(See 6.2.2)**
- b) Sub-layer Business Plans that support and communicate the Strategic Business Plan **(See 6.2.2)**
- c) Commitment and declaration of a Business Management Policy **(See 5.2)**
- d) Commitment and specification of Business Management Objectives, **(See 6.2.1)**
- e) Documented Business Management Policy Manual, **(See 5.4.1).**
- f) Defined practices and records specified in this Business Management Standard **(See 5.4.2)**
- g) Defined and authorized Business Plans and Programs **(See 6.2.2)**
- h) Defined instructions or practices, records, or information needed for the effective control of the Business Management processes.

The Company must ensure that personnel and stakeholders have access to, and are aware of, all relevant Business Management System documentation and details of all completed or intended changes.

Clause 6.1 of BMS75k commends the need for a Documented Practice to direct actions that can address Risks and Opportunities which contribute to the solution for Future Predictive Measures. Here we must consider the context of the Company and its operations, activities, and purpose by assessing the needs and expectations of all the interested parties when planning for the Business Management System. The practices for risk identification and management must also be the subject of a documented practice. The Company must identify risks that are detrimental to the company's future to ensure the Business Management System can achieve its intended results. This will include:

- a) Identify and prevent risks that are detrimental to our interests,
- b) Eradicate or contain all identified detrimental activities and their consequences
- c) Identify and embrace business risks and opportunities that are of benefit to its purpose,
- d) Use the Business Management System to prevent detriment to its interests,
- e) Continually monitor, review, and analyze results to determine the need for change
- f) Determine and report on the effectiveness of any actions taken.
- g) Improve the quality of management at all levels continually.

These practices must be identified, documented, and integrated into the Company programs and their contribution to the Strategic Business Plan monitored and recorded as a controlled business record to establish, implement, and maintain, in a documented practice, the activities required for managing all identified or foreseeable detrimental risks and their consequences including:

- h) assignment of responsibilities for risk management
- i) characteristics of the risks identified (e.g., likelihood, consequences, mitigation, and acceptance),
- j) assessment, conveyance, and communication of risk consequences to managers and staff
- k) management of actions to eliminate or mitigate risks that exceed the defined risk acceptance criteria,
- l) accommodations for risks remaining after containment and mitigation action

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2.0   The EFQM Model Results

Criterion 7: Strategic & Operational Performance
Predictive Measures for the Future Continued.

Clause 6.1.4 of BMS75k promotes the use of Process Planning, Management and with which to provide the solution for the management of Future Predictive Measures and requires all processes used within the conduct of the business which add value to the goods and services produced or provided, should be planned and controlled. In planning these processes, the Company must determine the following, as appropriate to the business:

  a)   activities and requirements for the processes involved.
  b)   objectives and requirements for the product of the processes including:

  • goods and service integrity and safety in use
  • reliability, availability, and maintainability
  • producibility and inspectability
  • suitability, integrity, and traceability of materials, components, and services used
  • ownership, status, and configuration of software, programs, and other intellectual property
  • precautions against counterfeit sub-tear goods and services
  • recycling or final disposal of the goods and services at the end of their life.

  c)   the need to establish Business Programs that prescribe processes, documents, and resources specific to the business.
  d)   required process monitoring, measurement, verification, validation, checks, and test activities
  e)   resource specific to the process and the criteria for completion.
  f)   records needed to provide evidence that the processes and results achieved prescribed requirements
  g)   configuration management appropriate to the process documents, data, programs, and records
  h)   resources to support the use and maintenance of the process plans and Business Programs

The output of this planning must be in a form that can be communicated and understood by the affected parties and suitable for the Company's method of operations. This output must be recognized as a controlled business record.

The Company must have a continuous improvement management project and produce a Business Program**,** to incorporate planned processes for business effectiveness and efficiency incorporating innovation flexibility, and integration with the Company's goods, services, and processes. The practices for process planning and control must be the subject of a documented practice or an equivalent method.

Clause 6.2 of BMS75k requires the use of Business Objectives and Plans with which to incorporate the solution for the management of Future Predictive Measures and directs the Company about the use of Business Objectives and Plans which is also an essential solution to Transform the Organization for the Future and for Engaging Stakeholders under Criterion 3 which is also an important consideration when considering and the management of the organization's future predictions.

These objectives shape the direction the Company is going to take, and as such, these values are attributes that must be reflected in the strategic plans and in the business objectives which requires the Company to select them for each future level of management or individual department and their collective interest. The selection and promotion of such objectives must be recorded as a controlled business record and must be:

  a)   In keeping with Business Policy
  b)   Suitable, calculable, appropriate, and time based
  c)   Responsive in addressing stakeholders' concerns and requests
  d)   Measured and the results collected, analyzed, and made available,
  e)   Published in an understandable fashion,
  f)   Changed when required after thorough technical evaluation
  g)   Reviewed to identify opportunities for improvement potential and
  h)   Used for the purpose of business development

The Company must complete and maintain a controlled business record of the current objectives and the results obtained. The practices for business objectives and plans must be the subject of a documented practice.

Sub-Clause 6.2.3 of BMS75k within Clause 6.2 requires the use of Business Objectives and Plans with which to incorporate the solution for the management of Future Predictive. Here the Company must provide for the analysis and planning of all business activities with which to document, maintain and conform to a Business Plan. It must assess, analyze, and record the current situation of business activities and update the Business Plans as directed by the Business Program.

The business analysis must be used to identify where in the future the Company can improve the business activities detailed in the Business Plans, by greater utilization of available resources.

Analysis determines the optimum level and compares the current utilization of finance, capacity, resources, processes, and markets available to the Company and those which are currently in use. Improvements should include:

  a)   Reducing waste,
  b)   Creating solutions,
  c)   Completing projects,
  d)   Improving efficiency,
  e)   Documenting the right requirements
  f)   Achieving agreed on targets.

The analysis must be completed in a timely fashion and results reported at specified intervals during the Business Program. The directives of the 5As can be applied to the Business Plans through traceable technical analysis, directed at realizing the strategic goals and objectives set out in the Strategic Business Plan.

The planning used must assess the resources and methods required in addition to those currently in use, that are needed to achieve future goals and objectives. This can include improving both efficiency and effectiveness of the documented Business Management System. Business Analysis Plans must be documented and recognized as a controlled business record.

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2.0   The EFQM Model Results
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Clause 6.3 of BMS75k requires consideration to be given to Business Continuity as part of the solution for the management of Predictive Measures for the Future. The Company must have a Business Continuity Plan which identifies the Company's exposure to internal and external threats and provides for effective prevention and recovery should such treats be realized or encountered. The plan must provide a proposed informed solution for continuing business activities and operations under adverse conditions.

The Business Continuity Plan must define how to continue operations, or the delivery of services, during disruption or interruptions resulting from all foreseeable adverse events such as industrial action, fires, floods, power outages, theft, vandalism, earthquakes, and pandemics.

Any event that could impact Company operations and business activities must be considered, such as loss of key personnel, supply chain interruption, loss of, or damage to critical infrastructure (major machinery or computing/network resource).

Risk management must always be incorporated as part of the Business Continuity Plan to reduce operational risk.

The business continuity plan must be documented and recognized as a controlled business record.

Note: *For guidance on establishing and maintaining a Business Continuity Plan, please refer to ISO22301, the international standard for Social Security-Business Continuity Management Systems-Requirements*

Clause 6.4 of BMS75k requires the management of change to be used as part of the solution for the management of Predictive Measures for the Future. It requires the Company to develop and maintain a documented practice to manage indigenous, foreseeable, and unforeseeable changes needed to improve, direct, or accommodate a change in its Business Management System and Business Objectives.

The documented practice must cover indigenous changes arising from the operation of the Business Management System, which present changes needed to compliment, advance, or are advantageous to the Business Management System and the core purpose and interests of the Company. This management of change document practice must contain a prescription for the identification and monitoring of known external matters which effect the current interests or operations within the Company over which the Company has no direct control but maintains the knowledge and intelligence needed to recognize when there is movement in their direction or occurrence.

The prescription must set out a standard practice to recognize when known external matters require changes to be made within the Company activities. The documented practice must also contain a prescription to recognize the occurrence of unforeseeable events which impose a change on the Company's Business Management System or its agreed objectives. These unforeseeable matters cannot be anticipated or planned for because they are:

a)   Beyond the realm of regular plausible expectations,
b)   Beyond the Company's influence to control or prevent,
c)   Explanations for changes or direction can only be made after the event,
d)   Only rationalized by way of hindsight.

When changes to the company's Business Management System are required due to indigenous, foreseeable, or unforeseeable events, their introduction must be authorized at the appropriate level, planned, recorded, and communicated.

All changes to the Business Management System must be introduced under a controlled management practice and must only proceed after completing a thorough and full technical evaluation of the known and foreseeable events and consequences resulting from the change. In addition, there are constant changes inside and outside the organization that need to be managed in parallel if it is to remain successful and in business. Changes must be communicated to all effected or interested parties and functions, to prevent inconsistency between policy, procedure, practice, and record to ensure the integrity of the Business Management System is always maintained, for control and continuity of the Company objectives and purpose.

Accountability for all change results, and decisions, must be determined and recorded to ensure all matters are traceable to the authorities tasked with the decisions made, and that decisions made are always defendable and tractable to the records and information available at the time of a decision, and on which decisions were reached. Completion of a change to the Business Management System must be incorporated into the company practices for configuration control and shall be reflected in the build standards for the products and services provided. Records must be produced and maintained of all change management decisions and shall be recognized as a controlled business record.

As a leading organization, the company must acknowledge that Key Stakeholder needs may change over time and that it is important to collect and analyze feedback to improve or change products, services, and solutions.

Clause 7.2 of BMS75k requires the management of Competence and Capability to be used as part of the solution for the management of Predictive Measures for the Future. All tasks and business activities undertaken by the Company should be evaluated and assessed to determine what competencies and capabilities would be required to complete the tasks in a correct and timely manner. Any person operating within the control of the Company and engaged in a business activity with assigned tasks must be assessed for competence and capability in the tasks given. In this respect the Company must:

a)   Assess what competence and capability each task requires
b)   Identify any special or unique attributes or characteristics of the tasks in question
c)   Assess the ability and capacity of the persons available to complete each task in a correct and timely fashion,
d)   Determine any additional need for education, training, or instruction to compensate for short-falls;
e)   Determine the impact or contribution such tasks have on the business performance,
f)   Assign the tasks to those capable and competent to complete each task to the known requirements
g)   Evaluate the effectiveness of the education, training, or instruction supplements provided
h)   Ensure records are completed for each task to evidence the level of competence required and attained.
i)   Direct and collect data for completing records of task performance and competence levels needed,

NOTE: *The Company can hire and subcontract external resources subject to the evaluation of a make or buy analysis prescribed under clause 6.1.3 of the Business Management Standard to supplement short-falls in competency, qualification, or experience.*

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2.0 **The EFQM Model Results**
Criterion 7: Strategic & Operational Performance
Predictive Measures for the Future Continued.

Clause 7.3 of BMS75k requires the inclusion of Awareness and Understanding to be used as part of the solution for the management of Predictive Measures for the Future. This mandates that personnel assigned to do work within the Company be made aware of:

    a)   Location, contents, and application of the Business Management policy
    b)   Their involvement in the Business Management System,
    c)   Importance and benefits of complying with the Business Management System
    d)   Exposure to risks and consequences of not complying with the Business Management System

The directives contained in the Business Management System and their influence on a given business activity or task must be made known and understood by those assigned to the work involved including:

    e)   What is it that, needs to be done?
    f)   What quality, quantity, time, financial or other constraints apply?
    g)   What methods and practices are used to process and verify?
    h)   Who to ask for additional information and advice?
    i)   Who to report to when the task is completed?

Clause 7.6 of BMS75k requires Resources and Support for External Influences to be included as a significant part of the solution for the management of Predictive Measures for the Future. This must include Company obligations and intentions in respect of National and International Business Activities such as:

    a)   Scope Considerations
    b)   Business Considerations
    c)   Cultural Issues and Conventions
    d)   Planning and Objective Matters
    e)   Performance Evaluation and
    f)   Improvements

The Company must anticipate, assess, accommodate, analyze, and account for all resource requirements needed to address and accommodate National and International Business Activity as part of the solution for the management of Predictive Measures for the Future. The resources needed to accommodate National and International business activity are financed by provisions within the financial plan and allocated to assigned authorities for the achievement of their objectives and goals as detailed in the Strategic Plan and provided for in the business program.

Clause 8.0 of BMS75k requires Business Operation to be included as an issue in the solution for the management of Predictive Measures for the Future. This requires the Company to identify the operational processes with which to manage the operational business activities stated in the Strategic Plan.

The processes must be controlled and documented to the greatest practical extent in process plans, documented practices task instructions, and work instructions, for consistency in operations and to communicate requirements to operational or service delivery departments and authorities.

The requirements for each operational process must include those needed for

    a)   Commencing the process   (Inputs)
    b)   Activities involved in the process   (Practices)
    c)   Product of the process   (Outputs) and
    d)   The means to measure the timeliness, quantity, and quality of the product of the processes at each stage in its sequence.

    Note: *Each process shall normally only have a single product but may depend on numerous inputs and contain several activities in sequences that must follow a defined route. Such multi-dependent activities when documented are referred to as a Process Plan.*

Clause 8.1 of BMS75k requires Operational Planning and Control to be included as an issue in the solution for the management of Predictive Measures for the Future. The Company is required to plan, implement, monitor, and control each of the operational processes and business activities identified in the Strategic Plan by:

    a)   Determining and communicating the criteria for the operational business activities and their processes in a Business Plan,
    b)   Implementing control of the business processes by monitoring business activities and performance under provisions made in the Business Plan,
    c)   Completing and retaining records necessary to demonstrate that the business processes have been carried out as planned.

Management of all intended changes in each future business process must be planned and reviewed to the greatest practical extent so that the consequences of any unintended changes are removed**.** All risks identified because of operational processes and changes to planned requirements must be managed under the risk management provisions and practices.

Changes to planned requirements must only be actioned after completing a thorough technical and comprehensive review and evaluation of the changes intended and their impact on the business activities of the Company and all interested parties and stakeholders. The review, evaluation, and consequences of each change should be determined and recorded as a controlled business record.

Clause 8.2 of BMS75k requires Customer Related Business Activities should naturally be included as an issue in the solution for the management of Predictive Measures for the Future. This includes the provisions and requirements of the following Sub-Clauses:

    8.2.1   **Determination of Requirements**
    8.2.2   **Review of Requirements**
    8.2.3   **Review of Requirement Applications and Use**
    8.2.4   **Customer Use Lifecycle Support and Provision.**
    8.2.5   **Customer Communication**

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Sub-Clause 8.2.4 of BMS75k addresses Customer Use, Lifecycle, Support, and Provision in the solution for the management of Predictive Measures for the Future. Here customer-related business activities which require the supply of goods or services must be supported by the Company for the duration of the known application.

The Company must establish the Criterion for the expected period of use and the support required for the envisaged period on the goods and services provided. This support must be suitable and enough for the intended use and period of use by known customers and end users. To comply with this requirement the Company must identify the possibility of risks associated with goods and service obsolescence and plan for the eventuality as part of its risk management practice.

There shall be an acknowledgment in the business activity of the obligation to customers which can be compromised by a decision to make goods or services obsolete, and this shall be anticipated from a risk perspective. Notification from marketing, design, or purchasing that goods or services are to be phased out or must cease to be available from a particular date, must be reviewed and all affected customers and authorities notified.

Contractual obligations to which the Company is committed must also be reviewed and assessed upon notification, or the possibility of obsolescence becoming a concern.

Clause 8.3 of BMS75k requires Research and Development Business Activities to take precedence as an activity in the solution for the management of Predictive Measures for the Future. This clause provides for a discipline of research and development management which normally escapes such impositions. It consists of:

8.3	Research and Development Business Activities
8.3.1	Research Business Activities
8.3.2	Development Business Activities
8.3.3	Research and Development Planning
8.3.3.1	Research and Development Authorization
8.3.3.2	Research and Development Project Plan
8.3.3.3	Commercialization Strategy
8.3.4	Research and Development Projects
8.3.5	Research and Development Inputs
8.3.6	Research and Development Outputs
8.3.7	Research and Development Results and Records
8.3.8	Research and Development Assessment
8.3.9	Research and Development Accountability

When research and development are identified within the Strategic Business Plan, as a principal business activity, the requirements and objectives for research and development must be anticipated, assessed, accommodated, analyzed, and accounted for under the Company's orientation, technology, range of goods and services and the experience of the assigned research and development authorities at its disposal.

Sub-Clause 8.3.1 in BMS75k concerns itself with the solution of Research Business Activities to be recognized as an innovative business activity that contributes to the Predictive Measures for the Future. It must have the freedom to explore new options directed by the strategic orientation of the Company.

Research is required to enquire into current and changing business circumstances and interests whilst maintaining a watch and brief on existing product and service applications in the changing markets and variable stakeholder interests. The research activity must identify with the 5As convention of anticipate, assess, accommodate, analysis and account and concentrate on the anticipation and assessment of needs and opportunities available that align with the Company's strategic interest and activities. The product of each research program and activity should produce a development specification which is required to translate an identified problem into a statement of needs and contain sufficient detail for development business activities to commence.

Sub-Clause 8.3.2 in BMS75k commends the solution found in Development Business Activities which directs the Company to establish, implement and maintain a high-level design development business activity as a progression from research work, but specifically tasked with technical evaluation and assessment of options and solutions in response to the needs identified by research business activities.

Development business activities are Predictive Measures for the Future and accountable for all prescriptions and projects handed over from research or referred for development from other assigned authorities. Once the input to development has been screened, it is assessed and confirmed as suitable for development work to commence.

The development process and sequence are also specified under this clause and include the producibility and testability of each option in the evaluation of each solution that is suitable, designable, producible, and measurable to address the needs research has identified. Consideration is given to the attributes, advantages, and disadvantages of each option identified as a suitable solution.

Development seeks to balance general requirements with specific requirements in this evaluation and requires validating the concepts chosen through screening against the defined needs criteria and including the following considerations:

d)	Intellectual property considerations,	(Such as parents, infringements, jurisdiction, or sovereignty)
e)	Statutory and legislative requirements	(Local, domicile, and global)
f)	Reimbursement	(Sources of funding and recovery of development costs)
g)	Business Models	(Solution characteristics in each available model)
h)	Prototyping	(Identify the Questions or Issues to be Addressed)

Particular attention must be given to information gathered through prototyping, which will affect the overall feasibility of a concept.

The additional information gathered through the considerations listed above (as well as other steps in the development process) should be directed toward the detailed user and design requirement specification for the solution selected.

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Sub-Clause 8.3.3 in BMS75k provides the Company with a solution found in the Planning of the Research and Development Activities and directs it to the contents of the Strategic Business Plan which must contain a description and provision for the Company to gain knowledge to design, develop, and enhance its business activities. These must include the products, services, technologies, and processes of the Company and make provision to be recognized as the authority to devise and conduct individual research or development projects as business activities.

Sub-Clause 8.3.3.3 in BMS75k directs the Commercialization Strategy which is core to Predictive Measures for the Future and how to design the value and how the Company creates it. Each research and development project must contain a detailed and practical commercialization strategy, comprising a defined plan on how the resulting product, process, or service will be introduced to the marketplace and how revenue will be generated. This includes how the commercial outcome of the project will be promoted, distributed, and sold. The commercialization strategy must include but not be limited to:

   a)   the need for this product, process, or service.
   b)   the size of the market and the targeted niche within the market.
   c)   known competitors and competing products, processes, or services.
   d)   major challenges for market penetration.
   e)   team and collaborator's commercialization expertise and know-how.
   f)   independent market assessments if available.
   g)   the value proposition that resulting products must deliver to the end customer.
   h)   how the resulting products must achieve competitive advantage in the marketplace.

When applicable a detailed breakdown of anticipated sales and market projections by product and customer must be included in the plan.

Sub-Clause 8.3.4 in BMS75k highlights the use of Research and Development Projects in finding solutions to Predictive Measures for the Future and how the Company designs value and how it is created. Projects for research and development must be registered and authorized for which a plan and prescription are determined and approved. These should include the research and evaluation of innovative and new developments, replacements for current goods and services, and the planned development of new goods and services required to realize the sales and marketing objectives. The type of project must be identified from one of four recognized classifications:

   a)   Pure Business Research consists of experiments and speculative business work authorized for acquiring new knowledge without long-term benefits focused principally on acquiring business knowledge or know-how.
   b)   Strategic Business Research is directed into specified areas to explore useful discoveries and provide a broad base of knowledge necessary for developing a solution to recognized practical problems.
   c)   Applied Business Research for a specific application to determine uses for the findings of basic research or to determine new ways of achieving some specific and predetermined objectives.
   d)   Experimental Business Development to extend knowledge gained from research or business experience to create new business activities or improved goods and practices. The Company must determine a research and development documented practice to define the levels and scope of authorization required for each of the above research and development project categories.

Sub-Clause 8.3.7 in BMS75k provides a specification and solution on what is required by way of results and records on research and development business activities. All records produced by the research and development business activities and projects must be determined and recognized as a controlled business record that hosts the Predictive Measures for the Future. As a minimum, these consist of:

   a)   Register of research activities and interests
   b)   Development specification
   c)   Research and development project plan
   d)   Research and development project review records
   e)   Design and selection prescriptions
   f)   Research and development assessment record

Each of the above records must be identified and traceable to an authority responsible for its review and approval for subsequent use and retention as a business record. All documents should be identified and controlled under the company's documented configuration control practices.

Sub-Clause 8.3.8 in BMS75k provides the solution on how to assess the product from research and development which effectively consummates the design of value and how the Company creates it as part of the solution for Predictive Measures for the Future. The Company must establish, implement, and maintain in a documented practice an assessment of the research and development activities and projects to measure the effectiveness of the business activities and their contribution to the Strategic Business Plan.

Research and development assessments must be incorporated into the Predictive Measures for the Future by assessment of goods and services or a separate analysis and review of the research and development business activity itself. The review must use available data for the goods and services it produces or provides as well as research and development records derived from individual projects.

They can also be used to manage the goods and services and decisions needed during each phase of a life cycle. The aspects and applications of the goods and services must be assessed, analyzed, and reviewed as part of the research and development program. They must be assessed at planned intervals to improve the goods and service success during each of the phases of their life cycle

(development -introduction – growth – maturity – decline).

As part of each assessment or review, the Company must demonstrate through documented knowledge of the goods and services provided:

   a)   An understanding of how the goods or service works within known applications,
   b)   The resources, including know-how, needed for the continued production or delivery of the goods or service
   c)   The resources and arrangements needed for the in-service support of the goods and services
   d)   Obligations and commitments for suitable arrangements to provide for the replacement of obsolete items.
   e)   The legal and statutory requirements applicable to the production, sale, and use.
   f)   Protection and provision for recourse against counterfeit goods and services.

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Clause 8.8 of BMS75k requires consideration to be given to External Business Operational Influences as an activity in the solution for the management of Predictive Measures for the Future. In addition to controlling internal operational Business Activities, the Company must consider all known External Business Operational Influences that can impact or create a need for change in the planned current and consistent Business Activities which must be matched to achieve the set objectives.

The Company must establish, implement, and maintain, in a documented practice, the activities required for determining and monitoring all identified or foreseeable external matters which advantage or detract from the planned business operations and influence the direction to follow for future predictive measures.

The need for change or mitigation must be considered for specific internal environment factors and attitudes which would directly affect the company's planned operations including:

    a)   Customer's requirement expectations, changes, and variations,
    b)   Suppliers' capacity variations and difficulties,
    c)   Employee requirements and expectations,
    d)   Competitors' activities and achievements,
    e)   Public preference, trends, and fashions,
    f)   Marketing techniques, campaigns, and promotions,
    g)   Media activities, intrusions, and adverse publicity,
    h)   Availability of information, experience, knowledge, skills, and advice,
    i)   Industrial action and disputes,
    j)   Surrounding infrastructure.

Consideration must be given to aggregate factors and influences that affect the Business Operation through the sector, area, or boundary in which the Company Business operates or is constrained, including, as appropriate:

    k)   National and International Statutory and Legislative Instruments
    l)   Political Domestic or Foreign Policy
    m)   Religious Orientation and Activity,
    n)   Economic Developments or Recessions,
    o)   Technology,
    p)   Social and Natural Environmental Change.

Sub-Clause 8.8.1 in BMS75k provides the solution on how to determine external business operational influences and requires the company to assess the external issues as a product from research and development which consummates the design of value and how it is created as part of the solution for Predictive Measures for the Future. Factors outside the control of the company must be determined for their impact on current operational Business Activities. Each factor should be registered and assessed by recording:

    a)   Description, by which to identify the factor,
    b)   Information Origin used to monitor its activity and influence,
    c)   Subjects and activities susceptible to the factors influence,
    d)   The assigned authority responsible for monitoring and reporting
    e)   Characteristics of the factors identified,
    f)   Management of actions to be taken when the factor is encountered,

Sub-Clause 8.8.2 in BMS75k provides the solution on how to Monitor External Business Operational Influence by requiring that the subjects and origin of all known external Business Operational influences should be monitored for their current and preferred level of influence and evidence of potential change, so appropriate action can be anticipated, assessed, accommodated, analyzed, and accounted for**.** The monitoring must consist of a review at planned intervals as part of the Business Program, for detecting changes in external influence factors and the subject's suitability and relevancy to the Company's current and future planned business operational activities.

Section 9 of BMS75k hosts the Business Performance Evaluations which directs the Company to review the performance of the Business Activities against the Strategic Business Plan at planned intervals by a documented practice and the provisions of the Business Program. The review includes:

    a)   Strategic Business Plan and its relevance to current activities.
    b)   Effectiveness of Sub-layer Business Plans and the reported achievements.
    c)   Business Program and its contents.
    d)   The results taken from monitoring, measurement, analysis, and evaluation of business performance.
    e)   Results and information derived from Internal Management Audits.
    f)   Actions arising from management reviews.
    g)   Actions taken to address risks and opportunities.

The Company is required to test and report on the effectiveness of, risk identification and management and several other predictive contributors to the business management program. Based on these issues, the company must review:

    h)   Current business objectives and the effectiveness of plans to achieve them
    i)   Changes to the Strategic and Sub-layer Business Plans
    j)   Proposed changes to the Business Objectives and Goals
    k)   Plans and Provisions for Business Continuity

In determining and evaluating the effectiveness of the business activities and practices, an account can be taken of the timeliness at which tasks and reports are completed, and their accuracy when compared against plans and objectives to which they relate or contribute. Records of the review must be maintained and recognized as a controlled business record.

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Clause 9.1 of BMS75k directs the Company on the requirements for Monitoring, Measurement, Analysis, and Evaluation for the management of Predictive Measures for the Future. Here the Company must determine requirements for monitoring, measurement, analysis, and evaluation of each business activity that contributes to the effectiveness of the Strategic Business Plan and the Business Program. Requirements for business activity verification activities, instructions, plans, and records must include:

   a)   What business practices require monitoring, measurement, analysis, and evaluation
   b)   What business practices incorporate their own explicit self-assessment and examination
   c)   What business practices require or would benefit from impartial assessment and verification
   d)   What verification practices and stages in Business Program must provide the required business information
   e)   Availability of suitable instruction and information that describes the verification tasks,
   f)   Benefits to be derived from having work instructions and task instructions with expected results,
   g)   Provision and use of suitable equipment, knowledge, and informed external advice or instruction,
   h)   Use of available internal and external verification resources,
   i)   Result assessment and criteria for adjustments, acceptance, and rejection
   j)   Accountability for business activity records and use of information in related decisions
   k)   Decision integrity and prevention of contamination by incorrect results and records being used,
   l)   Evidence of the use of accurate information and business standards
   m)   Appropriate control over misinterpretation of information and data supplied.
   n)   Availability and access to know-how and lessons learned
   o)   Reference to and deployment of business excellence standards,
   p)   How to replicate and repeat correct business activity decision-making,
   q)   Verification of business decision correctness if queries are raised at the latter stages
   r)   Appropriate verification records, result in retention and provenance with the business activities assessed.

The future business activity performance and the effectiveness of the Business Management System must be assessed from the results produced and action taken to direct changes when such results identify variations with the Strategic Business Plan and Sub-Layer Business Plans. Records of monitoring, measurement, analysis and evaluation of the business performance must be maintained and recognized as a controlled business record.

Sub-Clause 9.1.7 of BMS75k addresses the requirements for Stakeholder's Perception, Expectations, and Satisfaction. This directs the company to seek and understand the Stakeholder's Perceptions, Expectations, and Satisfaction as a contributor to the solution for the management and control of Predictive Measures for the Future. It requires the Company to measure the performance of the Business Management System, in respect of its obligation to its stakeholders. This must be from the collection and analysis of information relating to stakeholder perception assessed by the use of the Company's internal measures and actual perceptions provided by the stakeholders themselves. These are compared with those of other organizations when applicable. The methods for obtaining and using this information must be determined by a documented practice.

The Company must also develop and implement plans for stakeholder perception improvement that address deficiencies identified by these evaluations and assess the effectiveness of the results.

Monitoring stakeholder perception must include obtaining input from external parties as well as analysis of existing indigenous data derived from the business activities of the Company. Records produced and maintained for monitoring, measurement, analysis, and evaluation of stakeholder perception are recognized as a controlled business records.

Clause 9.3 of BMS75k introduces the Management Review as a forum for a solution in the management of Predictive Measures for the Future. Executive Management and assigned authorities are directed to attend and contribute to a management review of the Company's Business Management System.

The management review is a business activity planned to coincide with the completion of the internal audit schedule and listed as an event in the Business Program.

The review must be recognized as the supreme authority in matters about the Business Management System and is responsible for the stewardship and integrity of the Business Management System presiding over the benefits derived from conforming to the requirements of the Business Management Standard. The activity and business of the management review must be prescribed in an agenda that shall include where appropriate:

   a)   Risks and opportunities.
   b)   Monitoring and measurement results.
   c)   Internal audit results.
   d)   Stakeholder feedback as listed in the standard including

           i.   Shareholder and Investors
          ii.   Employees
         iii.   Trade Unions
          iv.   Trustees and Authorities
           v.   Customers and End Users
          vi.   Suppliers and Sub-contractors
         vii.   Trade Creditors
        viii.   Local and National Authorities
          ix.   Strategic Authorities and Professional Institutes
           x.   Statutory and Legislative Authorities
          xi.   Customs, Excise, and Revenue Authorities
         xii.   Banks, Credit Providers, and Other Financial Institutions

   e)   Business Activity Processes, Performance, and Conformity.
   f)   Results of 3rd and 2nd party assessments under this Business Management Standard.
   g)   Potential opportunities for continual improvement.

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BMQS Standard Appendix A Correlation and Cross Reference with the European Foundation for Quality Management 2020 (EFQM:2020)

2.0   The EFQM Model Results
Criterion 7: Strategic & Operational Performance
Predictive Measures for the Future.

Clause 9.3 of BMS75k Management Review Continued.
The management review must provide for collective assigned authority decisions to be published relating to:

h)   Risk Mitigation and Controls
i)   The need for Improvement
j)   Business Activity Opportunities,
k)   Need for changes to the Business Plans
l)   Need for changes to the Business Management Program
m)   Instigation and authorization for new projects

The methods for obtaining and presenting information to the Management Review and how decisions reached are communicated and enacted, should be determined by a documented practice. The management review should include consideration of the status of actions from previous management reviews and other meetings that have deferred an issue or concern to be sentenced at a higher level of authority within the Company.

Account must also be taken of changes in Business Activities brought about by developments in resources, technology, competition, and external issues that are relevant to the business of the management review and its role in the Business Management System.

The Business Management Representative will fulfill the duties and responsibility of the review secretary and takes minutes of the review which must be circulated for comments, correction, and information before being accepted as a true and accurate record of the business of the review.

The minutes having been accepted, approved, and authorized can then be used as evidence of the review. Records produced and maintained of all management review decisions are recognized as a controlled business records.

Clause 9.4 of BMS75k addresses the Management of Unforeseeable Events for a solution in the management of Predictive Measures for the Future. It requires the Company to review all External Business Influences that have made a negative impact on the Business Program and the agreed Business Objectives. The review must establish what unforeseeable incidents or sequence of events created a need for change in the Company Business Program and the agreed objectives.

The practices used to manage the unforeseeable events must also be assessed for their effectiveness and their consequences including as appropriate those for the Company and the business activities:

a)   Characteristics of the event *(type, origin, subject)*.
b)   Degree of consequence for the company *(Minor or Major)*.
c)   Scope and extent *(company specific, sector, or province).*
d)   Implications for the company and its stakeholders.
e)   Assignment of responsibilities for its management.
f)   Assessment, conveyance, and communication of action are required.
g)   Management and planning of actions to prevent a recurrence.
h)   Cost and evaluation of loss to Company of event.

The practices for the management of unforeseeable events must be the subject of a documented practice. The documented practice for the management of unforeseeable events can be a separate documented practice or incorporated into the procedure for External Business Operational Influences.

Clause 10.1 of BMS75k addresses Opportunities for Improvement which are realized by operating a business management system for a solution in the management of Predictive Measures for the Future. These opportunities for improvements are identified by the review of all aspects of the business activities specified or referred to in this Business Management Standard but must concentrate on the key issues where the Company know-how and knowledge give the Company advantage and most benefits to be derived from a continuous improvement program.

The methods for obtaining and using this information must be determined by a documented practice and include:

a)   Methods for the identification and management of risks
b)   Management of foreseeable opportunities
c)   Make or buy analysis and practices
d)   Project management
e)   Business processes and conduct,
f)   Outsourcing and subcontracting
g)   Goods and service improvement and development
h)   Business objectives realization and assessment
i)   Business planning and programs
j)   Business analysis and reporting
k)   Research and Development
l)   Design and selection
m)   Budget management
n)   Cost control
o)   Business continuity

Improvement activities must be evident and traceable from the details and benefits that are realized. Decisions made relating to each improvement proposed must be recorded, including those improvements that the Company adopts and those which are rejected or deferred. Records produced and maintained of all improvement decisions must be recognized as a controlled business record.

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**BMQS Standard Appendix A Correlation and Cross Reference with the
European Foundation for Quality Management 2020 (EFQM:2020)**

2.0   The EFQM Model Results
Criterion 7: Strategic & Operational Performance
Predictive Measures for the Future Continued.

Sub-Clause 10.2.4 of BMS75k addresses Preventive Measures which are taken by operating a business management system for a solution in the management of Predictive Measures for the Future. The Company must maintain and operate a documented practice for preventive measures needed to prevent non-conformance by inadequate or ill-informed decisions. This is particularly important in matters relating to the sale of goods and services, designs and selections, processes selection and priorities, products produced, and services provided.

The Company must identify all potential nonconformities by the application of this Business Management standard and its own Business Management System. Preventive measures are indigenous to the provisions, aspects, attributes, benefits, and contributions of the Business Management System.

Preventive measures incorporate the contribution of risk management and assessments as well as a program of reviews, verifications, validations, and assessments undertaken at appropriate stages in the Company business processes to determine:

a)   What decisions are needed to prevent errors and omissions
b)   When such decisions should be made
c)   what authorities should be assigned to the decision
d)   how the decision should be communicated or enforced
e)   at what stages, situations, and circumstances errors can occur
f)   what are the contributors that can create additional potential for error
g)   what action should be taken to prevent such errors
h)   what factors would need to occur that would culminate in errors going undetected
i)   how effective are the preventive measures in limiting errors and omissions as well as non-conformances
j)   must the preventive action proposed to resolve a potential problem or create immediate difficulties

Preventive measures must be applied to ensure decisions reached and acted upon within the business activities of the Company are always defendable and traceable to information and occasion in which the decision was formed and can be proven to be sound and correct at a later stage.

When a preventive action decision benefits one stakeholder's interest to the detriment of others, preventative measures taken must be sufficient for each assigned authority involved in a decision to be afforded a degree of due diligence by the operation and application of the preventive measures this Business Management standard requires.

When insufficient information is available to justify a decision and provide a defendable position, the basis on which a decision was made and its occasion, must be recorded.

Records produced and maintained of all corrective action decisions made and completed must be recognized as a controlled business record.

Clause 10.3 of BMS75k commends Continual Improvement by operating a business management system for a solution in the management of Predictive Measures for the Future. The Business Management System should be continually improved by the Company through the formulation of the Business plans, the effective implementation of the Business Program, adherence to the Business Management standard, and assessments of its effectiveness and conformance against agreed metrics and targets.

The Company must review and monitor the continuous improvement activities as part of the Business Management program process to:

a)   Highlight successes and failures,
b)   Identify necessary resource requirements
c)   Establish recovery plans where required.

Each Business Plan authority who contributes to the content of the Strategic Business plan is responsible for the relative improvement activity and monitoring progress in their vocational subjects. The Continuous Sustainable Improvement Plan should be revised and updated to show the current improvement projects and their status. This is an excellent opportunity to undertake a review of improvements projects and achievements.

Copies of the improvement plan and other improvement records must be available to those stakeholders who express an interest in understanding the continuous improvement activities within the Company. Records produced and maintained of all continuous improvement decisions made and completed must be recognized as a controlled business record.

Clause Ref	The EFQM Model Revised 2nd Edition	Clause Ref	BMQS75000:2020 Business Management Standard Prime Solutions and Directives
CRITERION 7	**STRATEGIC & OPERATIONAL PERFORMANCE**	**8.0**	**Business Operation**
(7.1)	**Achievements in delivering its Purpose and Creating Sustainable Value**	**8.1**	**Operational Planning and Control**
(7.2)	**Financial Performance**	**8.1.1**	**Financial Administration and Accounts**
(7.3)	**Fulfillment of Key Stakeholder's Expectations**	**9.1.3**	**Shareholder Perception Evaluation**
(7.4)	**Achievement of Strategic Objectives**	**6.2**	**Business Objectives and Plans**
(7.5)	**Achievements in Driving Performance**	**9.1.1** **9.1.2**	**Monitoring and Measurement of Processes** **Monitoring and Measurement of Goods and Services**
(7.6)	**Achievements in Driving Transformation**	**6.4**	**Management of Change**
(7.7)	**Predictive Measures for the Future.**	**5.4** **7.1.1** **7.6** **8.2.4** **8.3.1** **8.3.3.3** **8.8.2** **9.1.3**	**Documented Business Management System** **Resource Requirement Identification** **Resource and Support for External Influences** **Customer Use, Lifecycle, Support, and Provision** **Research Business Activities** **Commercialization Strategy** **Monitoring External Business Operational Influence** **Shareholder Perception Evaluation**

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Conclusion and Commendation

The advantages we have derived from this exercise by comparing the challenges in the European Foundation for Quality Management 2020 (EFQM) with the Business Management Standard BMS75000:2020 contents and solutions are significant.

The parity in both initiatives remains a significant validation of both methods by which a Company should approach the subject and integrity of Better Business Management.

There is a synergy between the BMS75000:2020 Business Management Standard and the European Foundation for Quality Management 2020 (EFQM) which compliments each other, despite the approach being from totally different positions.

This is because both the EFQM Model and Baldrige Excellence Framework 2021-2022 are inquisitive and non-prescriptive whereas the BMS75000:2020 Business Management Standard is Prescriptive and Instructional.

By compliance with BMS75000:2020 Business Management Standard, we can achieve a good score in the testing of the European Foundation for Quality Management 2020 (EFQM), and likewise, by scoring high in the foundation we can prove compliance with the BMS75000:2020 Business Management Standard.

These comparators and matrix show the European Foundation for Quality Management 2020 (EFQM) examination and inquiry into the integrity and performance of the organization to be greatly enhanced.

Matched against each question we have identified the solution from a clause and subject in the Business Management Standard BMS75000:2020 to verify and validate this conclusion.

Following this extensive exercise, I can commend the joint approach of the European Foundation for Quality Management 2020 (EFQM) and BMS75000 solution to you most strongly.

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