

INSTITUTE FOR PERFORMANCE EXCELLENCE



BALDRIGE | PERFORMANCE EXCELLENCE | QUALITY | LEADERSHIP

# **The Baldridge Foundation Institute for Performance Excellence**

*Presents:*

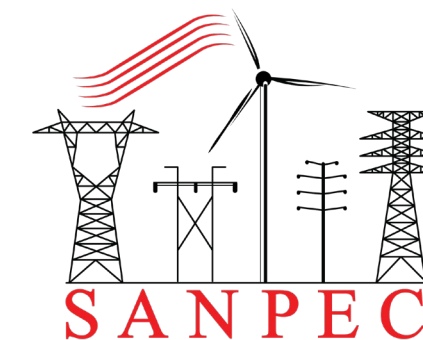
## **Making Excellence Routine** *The Role of the BPR in a High-Performance System*

*June 26, 2025*





## Mac Baldrige Society Members



# Opening Remarks/Agenda

**Introduction**      **Josh Racette**, President & CEO  
Baldrige Foundation

**Panelist**            **Debbie Collard**, Co-Founder  
Seasons Leadership

**Susan Ireland**, Co-Founder  
Seasons Leadership

**Audience  
Questions**          **Moderator – Josh Racette**

**Closing**            **Josh Racette Remarks**



SEASONS  
LEADERSHIP

Making Excellence Routine

*The role of the BPR in a high -performance system*



# Session Description

Excellence is not a one-time achievement—it's a habit built through disciplined, transparent processes. This session dives into how a well-executed Business Plan Review (BPR) becomes the engine of a high-performance system. Learn how BPR supports Baldrige-based leadership, ensures strategic deployment, and fosters a culture of continuous improvement by making what matters most visible, trackable, and actionable.





# Today's Challenge s

- ❖ Increasing demands for time and attention
- ❖ Pressure to balance competing priorities
- ❖ Choosing where to focus
- ❖ Continuity of the whole organization
- ❖ Communication and transparency
- ❖ Getting and staying focused and organized
- ❖ Loss of an experienced workforce at all levels
- ❖ Low morale

Leaders need practical, proven tools for success.



# The Solution – The Business Plan Review (BPR )

- ❖ A simple, proven tool
- ❖ Core component of Alan Mulally's Our "Working Together" © Leadership and Management System
  - Developed and implemented at Boeing and Ford
  - Used successfully in large corporations and small teams
  - Universally applicable when used consistently
- ❖ Works for any team size or structure
  - Corporations
  - Small Businesses
  - Non-profits
  - Teams
  - Families
  - Individuals

"The leader's job is to have a compelling vision, a comprehensive strategy, and a relentless implementation process." — Alan Mulally

# What is the BPR?

- ❖ A weekly meeting to:
  - Review vision, strategy, and performance to plan
  - Assess performance to plan using key metrics
  - Collectively address challenges
  - Recognize and celebrate successes
- ❖ Inclusive: every part of the organization is represented
- ❖ Ensures everyone in the organization has access to current information
- ❖ Driven by transparency, collaboration, support, and accountability
- ❖ Works toward a shared vision, strategy, and plan
- ❖ Requires consistent positive implementation

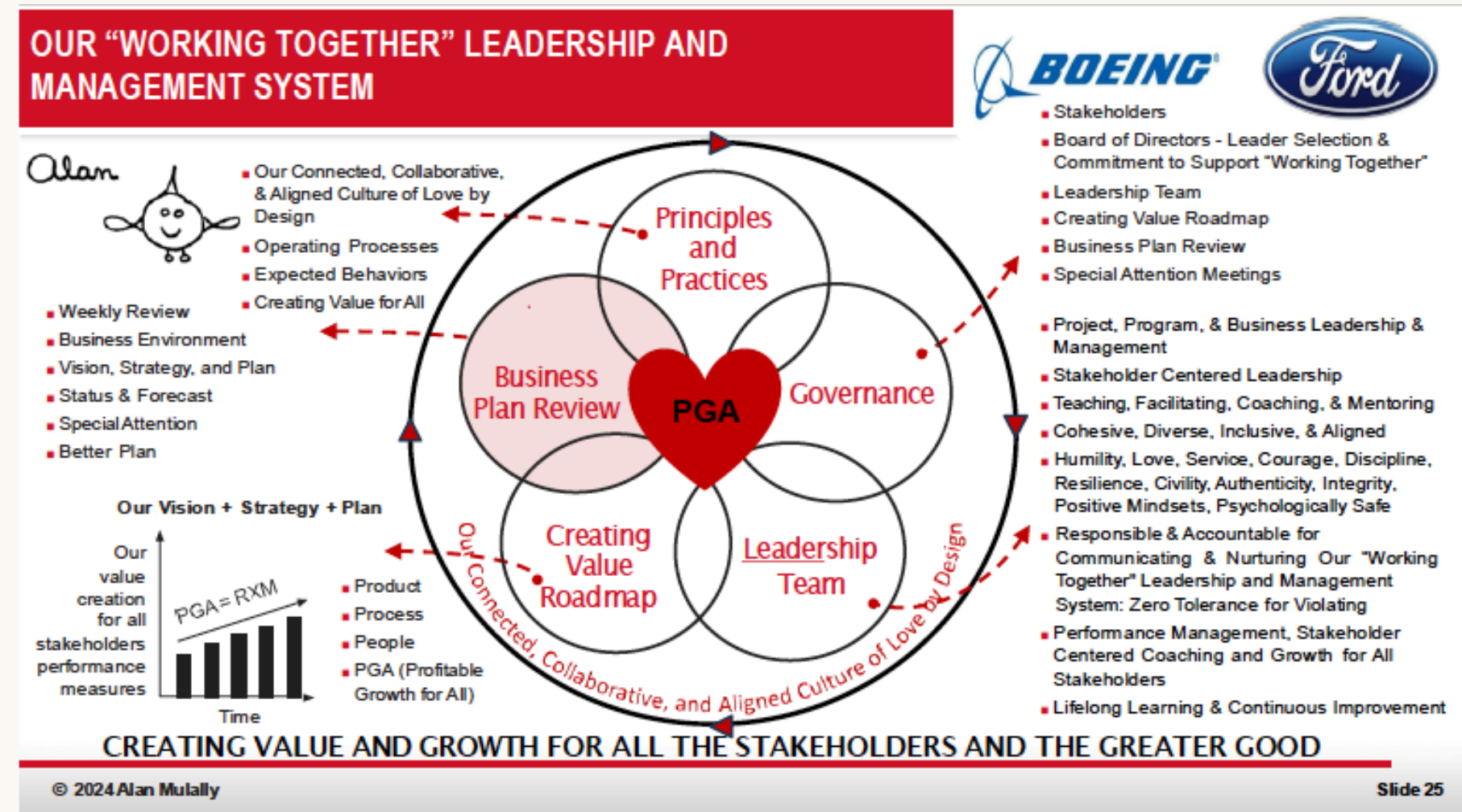
**“People want to feel that the work they do matters. Leaders must help them connect their work to a higher purpose.”**  
— *Simon Sinek, Leaders Eat Last*

A well –executed BPR is the engine of a high-performance leadership and management system.



# Key Elements of Our “Working Together”© Leadership and Management System

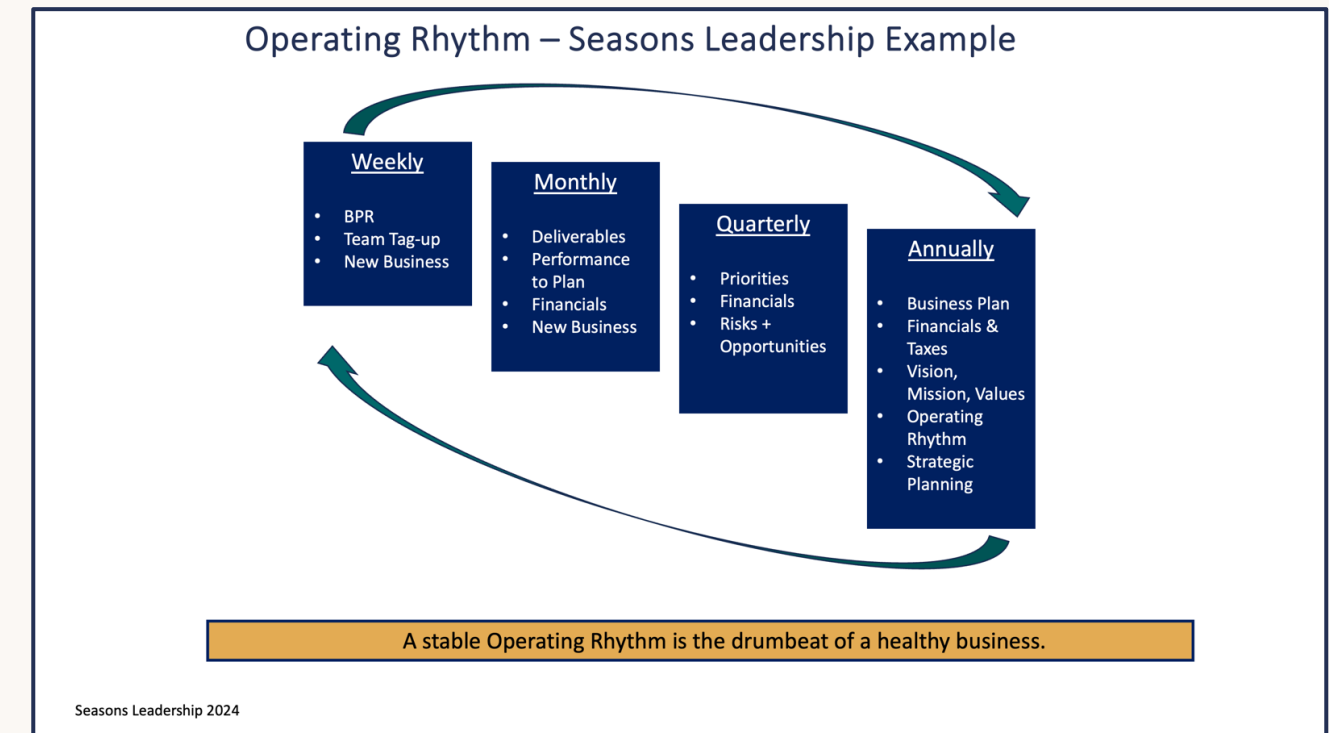
- ❖ Principles and Practices
- ❖ Governance Process
- ❖ Leadership Team
- ❖ Creating Value Roadmap
- ❖ Business Plan Review (BPR)



**“The leader’s role in the BPR – which is critical – is to create an environment conducive to Our “Working Together” © Leadership and Management System, encourage and nurture the organization’s operating processes and expected behaviors, and keep the BPR meeting on our relentless, positive , implementation plan.” - Debbie Collard and Susan Ireland, Fall 2024 Leader to Leader journal article, “The Business Plan Review – The Heartbeat of our Organization” {<https://onlinelibrary.wiley.com/doi/10.1002/ltl.20846>}**

# BPR Structure

- ❖ **Weekly Review** : Leader transparently shares relevant updates from the week
- ❖ **Vision, Strategy, and Plan**: The leader reviews these to reinforce the desired culture
- ❖ **Business Environment**: Appropriate functions share current events/situations
- ❖ **Status and Forecast**: Each leader shares current status & forecast for their part of the business
- ❖ **Special Attention**: Any topic that requires more time than normally allocated for routine topics
- ❖ **Better Plan**: Discuss/decide on any needed changes to the plan



The BPR is an integral part of the organization's Operating Rhythm.

The BPR is the integrating element of the Our “Working Together” © Leadership & Management System.



# How a Typical BPR Works

- ❖ Everyone shows up (on time or early!)
- ❖ Leader welcomes everyone; then leads team through:
  - Weekly Review
  - Vision, Strategy, and Plan
- ❖ Team Members present BPR elements related to their part of the business
- ❖ Everyone discusses:
  - Special Attention
  - Better Plan
- ❖ Meeting concludes with everyone aligned!



The leader doesn't talk much in the BPR – except for clarifying questions or to guide conversations.



# The Stoplight Chart & How it Works

## ❖ Performance Indicators:

- Green: On plan
- Yellow: Off plan, recovery in progress
- Red: Off plan, no recovery

## ❖ Tracks performance on metrics like quality, safety, schedule, etc.

## ❖ Focus is on what is needed to turn red and yellow lights to green

Example Company				
BPR Stoplight				
April 24, 2024				
Organization	Status <small>Last / Current</small>		Lead	Comments
Customers	R	Y	AM	Recent feedback has been that customers want 20% more product.
People	G	G	SM	Team engaged; OT within limits, top tier salary ranges for industry
Financial	Y	G	SH	Financial pressure for new machinery and inventory systems is required for higher production rates and new V2 product.
Comm / Marketing	G	G	LP	On Plan
Sales	R	Y	DC	Selling over production system capacity!
Plan/Schedule	Y	G	SI	On plan with signs that schedule may slip if OT limit is hit; feasibility study in work to accelerate V2 introduction.
Operations	Y	Y	XS	Working OT to meet customer demand of V1; developing a plan for V2 due next week.
R&D/Product Dev	Y	Y	TE	New V2 product in testing; launch scheduled for 3Q
Supply Chain	R	R	PV	Negotiations underway to increase component lot sizes to meet customer demand. Balancing V1 an V2 component configurations for seamless cutover.
Production System	Y	Y	CK	Scheduling 3 day downtime first week in June to install new machines and system.

\* Blue text indicates a change from last review

- Charting conventions allow rapid review; “No Change” is an acceptable report



# Guidelines for Successful BPRs

## DOs:

- ❖ Must be embedded in the overall leadership and management system
- ❖ Relentless and consistent weekly execution
- ❖ Every part of the organization must be represented (at the table)



## DON'Ts:

- ❖ Dismissing the BPR as too simple
- ❖ Inconsistent use or lack of follow-through
- ❖ Absence of psychological safety
- ❖ Leader abdicating their role in the BPR or dominating the conversation



“You have to create an environment where people feel safe to show red.” - Alan Mulally



# How the BPR Builds Culture

- ❖ Psychological safety, trust, and respect
- ❖ Encourages contribution from all levels
- ❖ Leadership Team members bring guests to see the BPR in action
- ❖ Aligns everyone to shared principles, practices and goals
- ❖ Leader sets and maintains the tone
- ❖ Promotes collaborative problem-solving
- ❖ Successes are celebrated collectively
- ❖ Used consistently throughout the organization



“It’s about your service as a leader nurturing the Business Plan Review process.” - Alan Mulally





# BPR Alignment with Baldrige Excellence Framework

- ❖ Leadership: The BPR is a key element of the Our “Working Together” © Leadership and Management System
- ❖ Strategy: The BPR key elements drive ongoing, weekly strategy discussions and updates
- ❖ Customer: The BPR process helps deliver ongoing customer value
- ❖ Measurement, Analysis and Knowledge Management: The BPR Stoplight Chart element discussion in each BPR is focused on this category
- ❖ Workforce: The BPR promotes a high-performance culture
- ❖ Operations: The BPR is a key work process and ensures the ability to operate effectively and achieve success



Baldrige and the BPR = a Complementary Alignment



# Simple, Adaptable, Proven Approach

- ❖ Can be used by:
  - Corporate teams
  - Small businesses
  - Families (Family Plan Review)
  - Individuals (Life Plan Review)
- ❖ Boeing 777 Program Success
- ❖ Ford's Turnaround under Alan Mulally
- ❖ Personal Leadership Transformation Stories

The common denominator is leadership!



# Why the BPR Always Works

- ❖ It is an integral part of the overall Our “Working Together” © Leadership and Management System
- ❖ The leader believes in and follow Our “Working Together” © Principles and Practices
- ❖ The leader holds everyone, including themselves, accountable
- ❖ The leader holds the space for the team to do the work
- ❖ Every part of the organization is represented at every BPR - at the table
- ❖ Transparency and accountability are practiced by everyone
- ❖ Everyone commits to helping implement the BPR and to helping each other continuously improve

The BPR is not about catching people failing. It’s about helping people succeed.





# Conclusion

- ❖ The BPR is not just a meeting – it’s a mindset that drives the desired culture
- ❖ With consistent use, it drives organizational progress, alignment, & success
- ❖ Learn more:
  - Leader to Leader journal article: Debbie Collard and Susan Ireland, Fall 2024 Leader to Leader journal article, “The Business Plan Review – The Heartbeat of our Organization”  
<https://onlinelibrary.wiley.com/doi/10.1002/ltl.20846>
  - Seasons Leadership Podcast with Alan Mulally <https://www.seasonsleadership.com/podcast/s5-e57>
  - [www.SeasonsLeadership.com](http://www.SeasonsLeadership.com)



The BPR works for any team —used consistently and with care. It is the work of leadership.

# Panelist Questions and Discussion



**Susan Ireland**  
Co-Founder  
Seasons Leadership



**Debbie Collard**  
Co-Founder  
Seasons Leadership



**Josh Racette**  
President & CEO  
Baldrige Foundation  
(Moderator)





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