HPCE used self-assessment as it formed an integral part of the management framework. This leadership and management framework applies the well-known Deming Plan, Do, Check, Act cycle. Implemented at the outset, it creates a learning and improvement ethos across the organization and has the objective of supporting sustainable profitable growth.

A key element of the framework is the use of annual self-assessment, which has the objective of reviewing the progress from the previous year, not just from a financial point of view but also in a holistic way. It reviews both the enablers and the results across a number of stakeholders.

The framework is applied in all the business units as well as at the HPCE board level. The other types of business units are:

- Categories – which are the units that manage the various ranges of products across Europe.
- Local companies – which are the representatives in each of the countries that HPCE trades in across Europe.
- Processes – such as supply chain, product development, IT and HR management.

The way that the self-assessments have been conducted has evolved over the years, as has the way that the outputs from the self-assessments have been used. The purpose of this case study is to explore this evolution together with some of the support needs and cultural aspects.

The start of self-assessment in HPCE

HPCE started to use the EFQM Excellence Model from the end of 1995 and carried out the first round of self-assessment in 1996. The intention to conduct self-assessments was announced during the first annual OBJ!* to the top 150 managers.

It was decided to carry out the assessments at country level, category level, factory level as well as at HPCE board level. Each unit nominated a facilitator and a first 'Business Excellence Conference' was held attended by the excellence manager from Texas Instruments, award winner in 1995. The conference was organized with the support of the Birds Eye Wall's business excellence manager, who was a highly experienced award assessor. During the conference, syndicate groups were used to select the key results at the country, category and factory levels.

It was decided to use the simplified Unilever checklist developed three years before by representatives from three UK companies, Birds Eye Wall's, Van Den Bergh Foods and Elida Fabergé. The simplified checklist provided a way for areas to commence self-assessment that was easy for everyone to relate to, which was especially important for the top team in order to gain their commitment. Much of the management understanding of the longer-term self-assessment process was gained at this stage.

Board members were not trained in the detail behind the EFQM Excellence Model, but only in the concepts of excellence and in the use of the Unilever checklist and process. The main

* OBJ! is a Unilever wide annual communication event. OBJ! stands for 'Oh be Joyful!'