

Step 3: Benchmarking Worksheet

Purpose: To help you plan for a benchmarking visit at another site.

Directions: If you use benchmarking you should follow the few guidelines listed below.

Benchmarking Guidelines

- **Be specific.** Be specific in defining what you want to improve. You may want to improve your entire manufacturing organization, but you may want to see specifically how a company uses supermarkets and kanbans.
- **Be willing to share.** Identify an area you think may be world-class in your organization, if you can, and present that to the potential benchmark site as a site for them—something you are willing to share.
- **Make a win-win proposal.** Attempt to make it a win-win experience. Identify what's in it for them! Offer something. At least they will know that you are sincere.
- **Know the site.** Ensure that the benchmark team is familiar with some aspects of the company you will benchmark (product[s], size, whether it's a union shop, etc.).
- **Send questions.** Fax or e-mail specific questions in advance to the benchmark company's point person.
- **Don't go alone.** Do not benchmark in isolation. It is always better to have a minimum of two members on the benchmarking team.
- **Document.** Document and take notes as needed.
- **Respect privacy.** If some information is proprietary and cannot be released, respect that and move on.
- **Dress appropriately.** Be sure to discuss attire prior to the visit. Many companies have a "business casual" dress code, but make sure you never underdress.
- **You can call.** Consider conference calling if an on-site visit is not practical.
- **Say thanks—often!** Show appreciation to the benchmarking site host. Consider presenting some appropriate gifts to those people you will be visiting.
- **Follow up.** Follow up with a letter to the host facility detailing what you found helpful. Again, offer to be a benchmark site for them at any time in the future.