

The ProfitLearn Benchmarking Service

The ProfitLearn Benchmarking Service is designed to build an extensive database of comparative information about the Performance and Training practices of Small to Medium -sized Businesses, Family Owned Businesses, Entrepreneurial Businesses and large corporations. The data collection instrument, the *ProfitLearn Benchmarking Survey*, represents a set of standardized measures that provide common ground for the comparison of results. This venture will help small to large firms monitor and improve the effectiveness of training and performance and link training to their bottom line.

This Survey uses standard questions to measure your organization's training and human resource practices and investments. It contains a set of required core questions on training investments, as well as a series of optional size and content-based question modules on training and related performance practices.

Participating companies will receive an annual comparative report of their organization against leading practice companies in their vertical market. This report is designed around the data collected as part of the core questions and a standard set of reporting criteria. By comparing aggregate answers for each question to those of other organizations offering similar training and human resource practices, organizations have access for the first time to benchmarks of performance and training outcomes and diagnostic feedback.

Please read all instructions thoroughly before beginning this survey.

Please return the completed survey to:

ProfitLearn, 500 Beaverbrook Court, Suite 301, Fredericton, NB E3B 5X4

Fax: (506) 459-0007

E-mail: info@profitlearn.com

CORE QUESTIONS

Please provide the information requested to the best of your ability. Some questions may request information that you do not have readily on hand. You are encouraged to contact other individuals within your organization, perform additional calculations, or do whatever is necessary to complete the questionnaire.

CONTACT INFORMATION

Contact Information

A customized benchmarking report will be sent to the person listed below.

Respondent information will be used for identification purposes only and will be kept strictly confidential.

- a. Name _____
- b. Title _____
- c. Organization _____
- d. Address _____
- e. Address2 _____
- f. City _____
- g. Province _____
- h. Postal Code _____
- i. Country _____
- j. Telephone _____
- k. Fax number _____
- l. Email address _____

SECTION 1 Company Demographics

1. Which industry classification best describes your organization's primary line of business? _____

2. Type of Business Family – Owned
 Small Business (In Business less than 5 years)
 Small Business (In Business 5 years or more)
 Large Enterprise Private
 Large Enterprise Public
 Large Enterprise (business unit)

3. Years in Business
 0-1 year 1-3 years
 4-5 years 6-10 years
 11- 15 years 16-20 years
 21+ years

4. Number of Employees (company or business unit)
 1-5 6-10
 11-20 21-50
 51-100 101-200
 201-500 500+

5. Percentage Employee growth in last year?
Increase % Decrease %

6. Percentage Employee in your organization belonging to a Union? %

7. Percentage Employee Education?
% with fewer than 12 years formal education
% with more than 12 years formal education
% with exactly 12 years formal education

8. Total sales volume for reporting year \$

9. Percentage increase in sales volume over previous year?
Increase % Decrease %

10. If your organization falls into Government/Public Administration sector please indicate level of your organization.
 Federal/National State/Province Local/Municipal

SECTION 2 Organizational Practices

Marketing Strategy

11. Which of the following types of strategies best reflects your organization's approach to marketing your products or services?

- Low Cost (primarily focused on delivery of product or service at lowest price possible)
- High Quality (Primarily focused on delivery of product or service of highest quality)
- Time-based (Primarily focused on fast turn around, speed and just in time availability)
- Other

12. Which of the following best describes your organization's approach to New Product Strategy?

- First to market (first in the market with new products or services)
- Early follower to market (early to market with new products or services)
- In step with competitors (reach market at peak demand for product or service)
- Late follower to market (late to market with proven developed product or service)

13. What percentage of your products are sold and distributed by the following geographic breakdown?

- | | | |
|---------------------------------|----------------------|---|
| Local (province) | <input type="text"/> | % |
| Regional (i.e. Atlantic Canada) | <input type="text"/> | % |
| National | <input type="text"/> | % |
| International | <input type="text"/> | % |

14. Which of the following best describes the long-term objectives of your organization?

- Take Public
- Family Owned/Family Managed
- Family Owned/Not Family Managed
- Management/Employee Owned
- Sell or Be Acquired
- No Definite Plans
- Other

Management Practices

15. Which of the following best describes your organization's approach to decision making?

- | | |
|--|--|
| <input type="checkbox"/> With Management Concurrence | <input type="checkbox"/> Without Consulting Top Management |
| <input type="checkbox"/> Collaborative | <input type="checkbox"/> With Conflicting Management Input |

16. What is the size of your management team?

- | | | |
|-------------------------------|------------------------------|------------------------------|
| <input type="checkbox"/> 1-2 | <input type="checkbox"/> 3-4 | <input type="checkbox"/> 5-6 |
| <input type="checkbox"/> 7-10 | <input type="checkbox"/> 11+ | |

17. How many levels of management does your organization currently consist of?

- 1 2 3 4 5+

18. How are job performance standards set in your organization?

- Set by Employees Set by Management
 Set by Management and Employees No Standards Set

Planning Practices

19. Does your organization have a written business plan? Yes No

20. Is the business plan shared regularly with all employees? Yes No

21. If you have a written plan how many years are represented?

- 1 year 2 years 3+ years

22. Does your organization benchmark its performance? Yes No

23. If Yes, who do you benchmark against?

- Industry Norms Similar World Class Firms
 Industry Leader Primary Competitor

Section 3 Employee Development and Training Investment

Employee Development

24. Does your organization have developed employee skill development goals and objectives that support the business plan? Yes No

25. Does your organization allocate budget to training and ensure that all employees see learning as a part of their annual activity targets? Yes No

26. What percent of your employees are trained in the following core business functions?

Business Function	% of Employees Trained
Marketing & Sales	<input type="text"/> %
Finance	<input type="text"/> %
Planning	<input type="text"/> %
Leadership	<input type="text"/> %
Technology	<input type="text"/> %
Risk Management	<input type="text"/> %
Operations	<input type="text"/> %

27. In terms of hiring for your organization, on a scale of 1 – 5 (where 5 is critical and 1 is not important), please rate the following attributes in selecting employees

Experience	<input type="text"/>
Education	<input type="text"/>
Geography	<input type="text"/>
Technology	<input type="text"/>
Finance Experience	<input type="text"/>
Network	<input type="text"/>

Training Investment

28. Approximately what percentage of all employees eligible to receive training (paid for by your organization) received or will receive training...

(a) in 2001	<input type="text"/>	%
** (b) in 2002	<input type="text"/>	%
(c) in 2003	<input type="text"/>	% (expected)

29. **What was the total annual payroll *without benefits* for all eligible employees in 2000. (note that this figure should include only wages and salaries).

30. If possible, please estimate the total monetary cost of training participants' salaries for the time they spent in training in 2002. (This can be calculated by multiplying the average hourly wage of training participants by the total number of hours spent by all participants in training during work hours.)

31. How do you anticipate the amount of money to be spent by your organization on all employee training in 2003 will change from 2002?

Increase	or	About the same	or	Decrease
(Enter %)		(please check)		(Enter %)
<input type="text"/>		<input type="text"/>		<input type="text"/>

32. How do you anticipate the amount of money to be spent by your organization on payments to outside trainers or outside training companies in 2003 will change from 2002?

Increase	or	About the same	or	Decrease
(Enter %)		(please check)		(Enter %)
<input type="text"/>		<input type="text"/>		<input type="text"/>

33. Which of the following sources provided training to your employees in 2002? Please check all that apply.

- (a) Universities
- (b) Community colleges
- (c) Technical and vocational institutions
- (d) Product suppliers
- (e) Private training and consulting companies
- (f) Unions, trade or professional associations
- (g) Federal, provincial, or local government organizations
- (h) Other (please describe)
- (i) Your own internal training resources
- (j) None of the above

34. Please estimate the percentage of all training time that was delivered to your organization's employees by the following methods in 2002. Then indicate the expected percentage in the year 2003.

	% of all training time in 2000	(expected) % of all training time in 2001
• Classroom (instructor-led or advanced technology)	<input type="text"/>	<input type="text"/>
• Learning technologies (non-classroom) (electronic technologies to deliver information and facilitate the development of skills and knowledge)	<input type="text"/>	<input type="text"/>
• Other self-paced instruction	<input type="text"/>	<input type="text"/>
• Other delivery methods	<input type="text"/>	<input type="text"/>
TOTAL	100%	100%

35. Please estimate the percentage of your organization's total expenditures in 2002 on the design, delivery, and analysis of training activities (courses, self-paced instruction, etc.) toward the following types of training. **Total should equal 100%.**

	%
(a) <input type="text"/>	Customer relations training refers to training on how to improve customer relations and provide customer service . Includes client-relations training for customer service/telephone/call center operators.
(b) <input type="text"/>	Sales and dealer training is provided to the sales force, franchisees, and dealers to develop the attitudes, skills, and habits needed to demonstrate the effectiveness of their products and services and to influence the purchasing decisions of prospects and customers.
(c) <input type="text"/>	Product knowledge training refers to training about the products and services of the company.
(d) <input type="text"/>	Quality, competition and business practices training includes all Total Quality Management, business process re-engineering, change management, benchmarking, resource planning, business ethics, business fundamentals, and time management courses.
(e) <input type="text"/>	Managerial/supervisory skills training refers to programs to improve the ability and effectiveness of employees to lead, manage, and supervise projects and teams/groups. Topics include human resource management, project management, process management, and planning and budgeting.

(f)	<input type="checkbox"/>	Executive development programs develop the leadership and vision of current and potential senior executives. Such programs focus on responsibilities and challenges for leading corporate-wide initiatives and/or major business units. Includes strategic planning, policy, and goal setting.
(g)	<input type="checkbox"/>	Occupational safety/compliance training is instruction provided to meet Environmental Health & Safety requirements, Equal Employment Opportunity and Affirmative Action requirements, right-to-know, and government-mandated training.
(h)	<input type="checkbox"/>	Interpersonal communication training refers to training in communication and cooperation among individuals and groups, including conflict resolution, stress management, diversity training, teamwork, and group dynamics.
(i)	<input type="checkbox"/>	Information technology skills training refers to training in the use of the company's information technology and systems, including off-the-shelf and company-specific software such as word processing, spreadsheets, databases, graphics, and communications. Also includes training for information technology professionals on the programming, support, maintenance, and administration of these internal systems.
(j)	<input type="checkbox"/>	Technical processes and procedures training refers to training that focuses on the company's processes and procedures to create and maintain its products and deliver its services. Includes training provided to employees who operate, maintain, and use machinery, except information technology.
(k)	<input type="checkbox"/>	Basic skills training refers to development and/or remedial training fundamental to the workplace in courses such as literacy, reading comprehension, writing, math, English as a second language, and learning how to learn.
(l)	<input type="checkbox"/>	New employee orientation training is designed to provide new employees with uniform introductory information about the company, its organization, mission, functions and policies, compensation, benefits, services, work requirements, standards, rules, safe work habits, and desirable employee-management relations.
(m)	<input type="checkbox"/>	Professional skills training refers to training in a specialized body of knowledge or expertise such as accounting, engineering, manufacturing systems, optics, electronics, mechanics, materials science, chemistry, physics, legal, medical, financial services, banking, and consulting. It is discipline and/or industry specific.
	100%	Total

36. To what percentage of your organization's employees do the following human performance management practices apply?

	None	1% to 49%	50% to 99%	100%
(a) Annual performance reviews: a systematic, periodic review and analysis of employee's job performance by a superior to compare that performance to a set of predetermined standards, identify strengths and weaknesses, and develop a plan to improve the employee's performance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b) Individual development plans: a specific course of action designed jointly by an employee and a supervisor to outline the employee's career development objectives and associated training needs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(c) Peer review of performance or 360 feedback systems: a performance appraisal system in which an employee's work performance is evaluated (at least in part) by co-workers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(d) Skill certification: a formal process used to ascertain and distinguish the mastery for a set of skills according to pre-defined standards. May be linked either to a particular occupation or trade, or a particular job or process.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(e) Documentation of individual competencies: a formal record of the knowledge, skills, and abilities of an organization's employees in key, pre-defined areas.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(f) Training information system: a computer-based system for assessing, tracking, and improving employee performance. Systems may include employee training history reports, training course scheduling and registration, individual development plans, and training expenditure tracking.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

37. To approximately what percentage of your organization's employees do the following work practices apply? Please check the appropriate box.

	None	1% to 49%	50% to 99%	100%
(a) Job rotation or cross training: programs in which employees are trained to do multiple jobs, or employees rotate among different jobs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b) Task forces, problem-solving teams, or quality circles: groups of employees that meet regularly to come up with solutions to problems concerning people and productivity.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(c) Self-directed work teams: groups of employees with complete responsibility for the quality and quantity of their outputs. Self-directed work teams may have responsibility for work schedules, performance appraisals, personnel management, budgeting, or setting performance targets and production quotas.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(d) Total quality management (TQM): an integrated approach to organizational improvement and increasing production and service quality whose core ideas include doing things right the first time, striving for continuous improvement, and a devotion to understanding and meeting customer needs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(e) Employee access to key business information: an organizational policy in which all employees are given access to certain financial and market information about the competitive position of the firm.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(f) Employee involvement with management in business decisions: an organizational policy in which non-management employees have a say in decisions including equipment purchases, market strategy, and management initiatives which affect the firm.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

38. *In comparison to 2001*, how would you rate your organization's performance during 2002 in the following areas?

	Better	No Change	Worse	Not Applicable	Don't Know
(a) Ability to retain essential employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b) Employee satisfaction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(c) Quality of products/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(d) Customer satisfaction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(e) Sales/revenues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(f) Overall profitability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

39. *In comparison to other organizations that are in the same primary line of business, how would you rate your organization's performance during 2002 in the following areas?*

	Better	No Change	Worse	Not Applicable	Don't Know
(a) Ability to retain essential employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(b) Employee satisfaction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(c) Quality of products/services	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(d) Customer satisfaction	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(e) Sales/revenues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(f) Overall profitability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>