



Lessons Learned and Shared on IPM's Baldrige Journey

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IPM's Baldrige journey was a roller coaster: thrilling, fast, and sometimes scary.

I learned about Baldrige during my time with Johnson & Johnson more than 30 years ago, and I understood it would be a significant undertaking. Though Integrated Project Management Company (IPM) has always been a very process-oriented company—driven by my strong bias toward the importance of efficient processes to ensure scalability and quality—pursuing the journey was not an easy decision. It would impose a large amount of work on top of managing the challenges of exceeding clients' expectations and growing our business. As part of our strategic planning process, we considered it and deferred it several times.

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What changed our minds was the desire for a highly credible, objective assessment of our strategy development, competitiveness, business model, processes, performance measures, and results. Up until the Baldrige journey, my performance review was based on my own critical assessment, our employees' annual survey, third-party surveys, and our top- and bottom-line results. While the executive team is self-critical, an objective third party would either validate or challenge

our assessment. Mostly, our desire was to improve our performance, competitiveness, and sustainability. We wanted to take our well-embedded continuous improvement process to a higher level.

One of the primary elements of our vision is to celebrate our 100th anniversary. To accomplish this, we must remain relevant and competitive in the marketplace. This requires IPM to continually evolve every aspect of our business model and processes. We identified the Baldrige Excellence Framework as a methodology that would enable greater discipline in planning our future while improving our competitiveness along the way.

The journey was every bit as challenging, exhilarating, and rewarding as we expected. We learned things about our processes and ourselves that could not have otherwise been readily discovered and addressed. Although the head of our Knowledge and Process Management department, Larry Meyer, and I went through examiner training, and he participated in a site visit, there are things you can't learn until you are on your own journey.

Because of IPM's project management core competency, I felt we had a significant competitive advantage. We know how to work toward a deadline, how to focus resources, and how to get things done. We managed the journey as a project and made it one of our strategic initiatives within our 2014–2015 Strategic Plan.

The investment was high—both in dollars and even more so in the time and effort required. Keeping the organization engaged required strong and continual executive sponsorship, involvement, and promotion. Along the way, there were approximately 80 people involved to various degrees; these included personnel from Operations, Finance, Marketing, Human Resources, Office Administration, IT, Knowledge and Process Management, and each of our seven offices.

The high level of activity and progress created positive, measurable improvements, fueled engagement, and helped sustain and accelerate our rapid four-and-a-half-year journey.

The Malcolm Baldrige National Quality Award is validation of the high performance caliber of our people. At the risk of bragging, we have an awesome family. We hire people who share our Fundamental Values of Honesty, Integrity, Caring, Responsibility, Excellence, Humility, Respect, and Spirituality. These deeply caring and committed individuals are IPM's secret weapons.

The award also validates the effectiveness of IPM's business model and processes that enable our sustained growth and competitiveness. For our clients, it puts us in a league of prestigious organizations; shows that we are a high-performance, high-quality firm; and further differentiates IPM. Some of the most gratifying reactions have been from clients who stated they weren't surprised.

Earning the Baldrige Award has also provided us with the opportunity to share what we've learned with organizations in almost every sector of our economy. We have been honored to present our experiences and results at many national and regional Baldrige conferences. If you are considering pursuing the Baldrige Award, know that it requires deep and sustained leadership commitment. There will likely be several attempts, lessons learned to be applied, improvements to be made, and momentum to be reestablished before accomplishing the ultimate goal. However, there are many benefits along the way—as with each step and each application submittal, you will improve your operations and know clearly the best path forward.

Be prepared to accept criticism and to encourage the organization to embrace it. The first time we applied for the Illinois Performance Excellence (ILPEX) Recognition Program, Illinois's state-level affiliate to the Baldrige Program, we received a Silver award and a lot of critical, constructive feedback. We were disappointed, but instead of being discouraged, we were more emboldened to succeed. We didn't apply the next year, but it was probably one of our most intense years of the journey, because we worked hard on addressing the opportunities for improvement (OFIs) that were revealed. When we applied the



Richard Panico, Founder, President, and CEO of Integrated Project Management Company, shares with the Baldrige examiners his insights for driving performance excellence with the Baldrige Excellence Framework.

following year, we received a Gold ILPEX award and submitted our application the following year for the national award.

For immature organizations, Baldrige is an excellent process for establishing a model and practices that will support insightful strategy development to ensure competitiveness and controlled scalability. For mature companies that have been successful and continually evolved, it provides an opportunity to accelerate growth and competitiveness. The process will uncover previously obscure improvement opportunities and drive a more objective and critical review of every aspect of the business.

It is most important to understand and accept that it's not about the award at all, but rather the opportunity to position the organization for continued, profitable growth. Our Baldrige journey is not over despite the achievement of the award. We have embedded Baldrige continuous improvement methodologies into our business to continue to defy complacency. I have already poised the organization for resubmittal of an application in 2023. The results will validate whether we were able to maintain a disciplined approach to continuous improvement.

If your company is considering the journey, get ready for a challenging, exciting, and rewarding ride.