

# OPERATIONAL EXCELLENCE

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## ASSESSOR TRAINING PROGRAM

**Benchmarked Against EFQM 2020 Framework**

Designed for Gulf & GCC Organisations | 5-Day Program | Mixed Levels

# 1. Training Overview

## Program Summary

This 5-day intensive training program develops participants into capable Operational Excellence Assessors using the EFQM 2020 Excellence Model — the globally recognised framework adopted widely across Gulf and GCC excellence award programs including the Sheikh Khalifa Excellence Award (UAE), Dubai Quality Award, National Quality Award (Saudi), and Qatar Award for Excellence.

The program blends conceptual grounding with hands-on assessment practice. Participants will navigate the full EFQM model, master the RADAR scoring logic, conduct mock site visits, and write assessor feedback reports — emerging ready to participate in real assessment panels.

<b>Program Title</b>	Operational Excellence Assessor Training
<b>Framework</b>	EFQM 2020 Excellence Model
<b>Self-Study Book</b>	"The EFQM Model" — published by EFQM (available at <a href="https://efqm.org/shop">efqm.org/shop</a> )
<b>Duration</b>	5 Days (40 hours total)
<b>Daily Schedule</b>	08:30 – 16:30 (7 hours instruction + 1 hour breaks)
<b>Audience</b>	Mixed — Quality professionals, managers, executives, and aspiring assessors
<b>Max Participants</b>	24 participants (6 teams of 4)
<b>Language</b>	English (Arabic glossary provided)
<b>Delivery Mode</b>	Instructor-Led, Face-to-Face with printed workbooks
<b>Certification Alignment</b>	EFQM Certified Assessor pathway (EFQM Brussels)

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## 2. Training Objectives

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Upon successful completion of this 5-day program, participants will be able to:

### Knowledge Objectives

1. **EFQM Architecture:** Explain all 8 criteria of the EFQM 2020 model and the relationships between the WHY / HOW / RESULTS blocks
2. **RADAR Logic:** Apply the RADAR scoring logic accurately to both Enabler and Results criteria
3. **Assessment Process:** Describe the end-to-end EFQM assessment process from desk review to feedback report
4. **Gulf Context:** Map EFQM criteria to local GCC excellence award requirements and organisational contexts

### Skill Objectives

5. **Evidence Evaluation:** Evaluate organisational evidence against EFQM criteria with structured assessor thinking
6. **Scoring Calibration:** Score using RADAR within acceptable calibration range ( $\pm 10\%$  of master score)
7. **Interviewing:** Conduct structured site visit interviews using targeted, evidence-seeking questions
8. **Report Writing:** Write clear, evidence-based assessor feedback reports with actionable improvement areas
9. **Consensus Building:** Lead or participate in a scoring consensus discussion as part of an assessor team

### Behavioural Objectives

10. **Assessor Mindset:** Demonstrate objectivity, professionalism, and a development-focused assessor mindset
11. **Collaborative Assessment:** Work effectively in cross-functional assessor teams under time pressure
12. **Continuous Improvement:** Commit to applying OpEx principles back in their own organisational role

### 3. Training Duration

Day	Theme	Hours	Focus Type
Day 1	EFQM Foundations & Model Architecture	7 hrs	Conceptual
Day 2	HOW Block — Leadership, Culture & Stakeholders	7 hrs	Conceptual + Analysis
Day 3	RESULTS Block & RADAR Scoring Logic	7 hrs	Applied Practice
Day 4	Assessment Process & Site Visit Simulation	7 hrs	Simulation
Day 5	Feedback Reporting, Final Simulation & Certification	7 hrs	Assessment + Capstone
<b>TOTAL</b>	<b>5-Day Assessor Training Program</b>	<b>35 hrs instruction</b>	<b>+ 5 hrs breaks</b>

#### Self-Study & Certification Path

Participants are encouraged to purchase the official EFQM book "The EFQM Model" (ISBN available at [efqm.org/shop](http://efqm.org/shop), approx. EUR 90) and complete the EFQM online Assessor certification upon program completion. The book is structured around the same 8 criteria covered in this training and serves as the primary self-study reference.

## 4. Training Methodology

This program uses a blended adult-learning methodology built on the 70:20:10 principle — 70% experiential (doing), 20% social (team learning), and 10% formal input. The approach is deliberately Gulf-context sensitive, drawing on regional organisations and real GCC award submissions as case material.

Method	Description	Purpose
<b>Concept Setting</b>	Trainer-led sessions with visual frameworks, EFQM model navigation, and real Gulf case examples	Morning anchors for each day
<b>Case Study Analysis</b>	Teams analyse real or fictional Gulf/GCC organisation submissions	Peer learning + practical scoring
<b>RADAR Scoring Labs</b>	Hands-on scoring exercises using the official EFQM RADAR logic tool	Core assessor skill-building
<b>Mock Site Visit</b>	Role-played site visit with interviewee/assessor rotation	Day 4 full simulation
<b>Team Competitions</b>	Daily team challenge with leaderboard scoring	Gamification engine
<b>Reflection Journaling</b>	End-of-day structured reflection using "What / So What / Now What" model	Metacognitive reinforcement
<b>Final Assessment Panel</b>	Full assessor panel simulation — feedback report writing & consensus scoring	Day 5 capstone






### Room & Materials Setup

- Cabaret seating — 6 tables of 4 participants (permanent teams throughout the 5 days)
- Each table: printed EFQM workbook, RADAR scoring cards, scoring sheets, whiteboard markers, sticky notes
- Trainer station: projector + large screen, EFQM model poster on wall, digital leaderboard display
- Printed case study packs: Gulf Excellence Co. (fictional GCC organisation — 40-page submission)
- Gamification props: badge cards, leaderboard flipchart, point tracking sheets per team

## 5. Gamification Framework

Gamification is a core design element of this program — not an add-on. It drives engagement, healthy competition, knowledge retention, and peer learning. The system is transparent, fair, and tied directly to learning objectives.

### 5.1 Badge & Rank System

Badge / Rank	How to Earn	Points Required	Reward
 <b>Trainee Assessor</b>	Complete all Day 1 activities + quiz	0–100 pts	Digital badge
 <b>Bronze Assessor</b>	Score 70%+ on Day 2 scoring exercise	101–250 pts	Certificate of Participation
 <b>Silver Assessor</b>	Lead a mock site visit team + pass Day 4 case	251–450 pts	Signed certificate
 <b>Gold Assessor</b>	Top scorer in final assessment simulation	451–600 pts	EFQM Assessor Readiness Letter
 <b>Excellence Champion</b>	Bonus: submit a real improvement idea	+50 bonus pts	Priority for real EFQM panel

### 5.2 Points Accumulation System

Activity	Description	Points	Max Total
<b>Daily Quiz</b>	Multiple-choice knowledge check (10 questions)	10 pts	5 days = 50
<b>Team Challenge</b>	Group case study / scoring exercise	20 pts	4 challenges = 80
<b>Mock Assessment</b>	Structured scoring using EFQM RADAR	30 pts	Days 3–5 = 90
<b>Leaderboard Bonus</b>	Top team each day wins bonus	+10 pts	Up to 50
<b>Reflection Journal</b>	Submit daily learning reflection card	5 pts/day	5 days = 25
<b>Final Simulation</b>	Full assessor panel simulation	50 pts	Day 5 = 50
<b>Improvement Idea</b>	Bonus: submit one improvement idea card	+50 bonus	Optional
<b>TOTAL</b>			<b>345 pts + 50 bonus</b>

### 5.3 Leaderboard Rules

- Teams are named after GCC excellence awards: Dubai, Abu Dhabi, Riyadh, Doha, Muscat, Kuwait
- Leaderboard is visible at all times on the front flipchart and updated after each activity
- Individual scores also tracked for personal badge progression
- Trainer announces "Star of the Day" each morning — individual who contributed most the prior day
- No negative points — all competition is additive and developmental
- Ties resolved by speed of submission on that day's final activity

## 5.4 Daily Rituals

- **Morning (08:30):** Leaderboard review + daily challenge rules briefed
- **Mid-day:** Team challenge scoring and bonus points awarded after lunch
- **Close (16:00–16:30):** Daily quiz (10 questions) + reflection journal card submitted
- **Day 5 Close:** Grand leaderboard ceremony, badge distribution, Gold Assessor award

## 6. Day-by-Day Training Outline

Each day follows a consistent rhythm: morning concept anchor → team challenge → afternoon applied practice → daily quiz and reflection. The outline below details every session including timing, content, delivery method, and gamification points.

### Day 1: Foundations of Operational Excellence & the EFQM Model

DAY 1		Foundations of Operational Excellence & the EFQM Model		
Time	Session Title	Content & Activities	Method	Points ⌚
08:30–09:00	<b>Welcome &amp; Orientation</b>	Program overview, team formation, rules of engagement, gamification briefing — badges, leaderboard, and daily quiz explained	Plenary	<b>5 pts (quiz)</b>
09:00–10:30	<b>What is Operational Excellence?</b>	Defining OpEx vs. performance management; why organisations pursue excellence; Gulf & GCC excellence landscape (SKEA, DQA, NQA, KAQA); evolution of quality frameworks	Lecture + Discussion	—
10:30–10:45	<b>Break</b>	—	—	—
10:45–12:15	<b>EFQM Model 2020 — Architecture</b>	The 3 blocks: WHY (Purpose, Vision, Strategy) / HOW (Organisational Culture & Leadership, Engaging Stakeholders, Driving Performance) / RESULTS; linkages and flow; comparison with older EFQM 2013	Visual Mapping	—
12:15–13:15	<b>Lunch Break</b>	—	—	—
13:15–14:30	<b>Deep Dive: WHY Block</b>	Criteria 1–2: Purpose, Vision & Strategy — key concepts, guiding questions, and what evidence an organisation must demonstrate; GCC examples	Group Activity	<b>20 pts (team)</b>

DAY 1		Foundations of Operational Excellence & the EFQM Model		
14:30–15:30	<b>Team Challenge #1</b>	"Spot the Criterion" — teams match 20 organisational practices to the correct EFQM criterion. Fastest accurate team wins leaderboard bonus	Team Game	10 pts bonus
15:30–15:45	<b>Break</b>	—	—	—
15:45–16:30	<b>Daily Quiz &amp; Reflection</b>	10-question quiz on Day 1 content; reflection journal card: "What surprised me most about the EFQM model today?"	Individual	10 pts (quiz) + 5 pts (journal)

## Day 2: EFQM HOW Block — Leadership, Culture & Stakeholder Engagement

DAY 2		EFQM HOW Block — Leadership, Culture & Stakeholder Engagement		
Time	Session Title	Content & Activities	Method	Points ⌚
08:30–09:00	<b>Leaderboard Review &amp; Warm-Up</b>	Day 1 scores announced; Day 2 challenge rules briefed; 5-min energiser — "Assessor Mindset" pledge	Plenary	—
09:00–10:30	<b>Criterion 3: Organisational Culture &amp; Leadership</b>	Leadership behaviours in EFQM; building a culture of excellence; role of leaders as role models; what assessors look for; common gaps in Gulf organisations	Lecture + Case	—
10:30–10:45	<b>Break</b>	—	—	—
10:45–12:00	<b>Criterion 4: Engaging Stakeholders</b>	Identifying and segmenting stakeholders; co-creation and partnership models; sustainability and ESG alignment; how to assess stakeholder evidence effectively	Workshop	—
12:00–13:00	<b>Lunch Break</b>	—	—	—

DAY 2 EFQM HOW Block — Leadership, Culture & Stakeholder Engagement				
13:00–14:15	<b>Criterion 5: Driving Performance &amp; Transformation</b>	Process management, agility, digital transformation; innovation cycles; how culture and process interact; EFQM and ISO 9001 alignment points	Group Analysis	20 pts (team)
14:15–15:15	<b>Team Challenge #2</b>	"Evidence Hunt" — teams receive a sample organisational submission (2 pages) and must identify strengths and improvement areas for Criteria 3–5 in 30 minutes	Team Case	10 pts bonus
15:15–15:30	<b>Break</b>	—	—	—
15:30–16:30	<b>Daily Quiz &amp; Reflection</b>	10-question quiz; reflection card: "One leadership behaviour I observed in my own organisation that aligns (or misaligns) with EFQM Criterion 3"	Individual	10 pts (quiz) + 5 pts (journal)

### Day 3: RESULTS Block & Introduction to RADAR Scoring Logic

DAY 3 RESULTS Block & Introduction to RADAR Scoring Logic				
Time	Session Title	Content & Activities	Method	Points ⌚
08:30–09:00	<b>Leaderboard Review &amp; Warm-Up</b>	Running totals; Day 3 briefing; "Star of the Day" recognition	Plenary	—
09:00–10:30	<b>EFQM Results Criteria (6–8)</b>	Criterion 6: Stakeholder Perceptions; Criterion 7: Strategic & Operational Performance; Criterion 8: Societal Performance; understanding lagging vs. leading indicators; what "good results evidence" looks like	Lecture + Examples	—
10:30–10:45	<b>Break</b>	—	—	—

DAY 3		RESULTS Block & Introduction to RADAR Scoring Logic		
10:45–12:00	<b>RADAR Logic — Explained</b>	What RADAR stands for: Results, Approach, Deploy, Assess & Refine; how RADAR replaces the old scoring model; scoring attributes for Enablers vs Results; 0–100 scoring bands and what each means	Trainer Demo	—
12:00–13:00	<b>Lunch Break</b>	—	—	—
13:00–14:30	<b>RADAR Scoring Lab #1</b>	Teams receive a pre-prepared Enabler evidence extract (Criterion 3). Each member scores independently, then team reaches consensus. Scores compared to master key — debrief on calibration	Scoring Lab	30 pts (mock)
14:30–15:15	<b>Team Challenge #3</b>	"Score the Claim" — rapid-fire scoring exercise: 8 evidence statements shown one by one, teams score on whiteboards. Highest accuracy wins	Team Game	10 pts bonus
15:15–15:30	<b>Break</b>	—	—	—
15:30–16:30	<b>Daily Quiz &amp; Reflection</b>	10-question RADAR-focused quiz; reflection card: "Where did my score differ from the consensus and why?"	Individual	10 pts (quiz) + 5 pts (journal)

## Day 4: Conducting the Assessment — Site Visit Simulation

DAY 4		Conducting the Assessment — Site Visit Simulation		
Time	Session Title	Content & Activities	Method	Points 🕒
08:30–09:00	<b>Leaderboard Review &amp; Day 4 Briefing</b>	Top 3 teams revealed; introduce the mock organisation "Gulf Excellence Co." — fictional GCC	Plenary	—

DAY 4		Conducting the Assessment — Site Visit Simulation		
		company; role assignments: Lead Assessor, Assessor, Observer		
09:00–10:30	<b>Assessment Process — End to End</b>	Phases of an EFQM assessment: desk review → consensus scoring → site visit → feedback report; assessor code of conduct; confidentiality and conflict of interest; question formulation techniques	Lecture + Role Play	—
10:30–10:45	<b>Break</b>	—	—	—
10:45–12:00	<b>RADAR Scoring Lab #2 — Results Criteria</b>	Teams score a Results evidence pack for Gulf Excellence Co. (Criteria 6 & 7); independent scoring, team consensus, comparison to master	Scoring Lab	30 pts (mock)
12:00–13:00	<b>Lunch Break</b>	—	—	—
13:00–15:00	<b>Mock Site Visit Simulation</b>	Full 2-hour simulation: Group A = assessors, Group B = interviewees (Gulf Excellence Co. executives). Assessors conduct structured interviews using pre-prepared question bank. Rotation after 60 min. Observers score quality of questions and evidence probing	Role Play	20 pts (participation)
15:00–15:15	<b>Break</b>	—	—	—
15:15–16:00	<b>Site Visit Debrief</b>	Open debrief: what worked, what evidence was missed, question quality review; trainer feedback on common assessor errors; tips for real assessments	Facilitated Debrief	—

DAY 4 Conducting the Assessment — Site Visit Simulation				
16:00–16:30	Daily Quiz & Reflection	10-question quiz; reflection card: "One thing I would do differently as a Lead Assessor"	Individual	10 pts (quiz) + 5 pts (journal)

## Day 5: Feedback Report Writing, Full Simulation & Certification

DAY 5 Feedback Report Writing, Full Simulation & Certification				
Time	Session Title	Content & Activities	Method	Points 
08:30–09:00	Final Day Briefing & Leaderboard Update	Full standings; explain final assessment simulation rules; Gold Assessor prize announcement criteria	Plenary	—
09:00–10:30	Writing the Assessor Feedback Report	Structure of the EFQM feedback report: Strengths, Areas for Improvement, Score Summary; writing with evidence, avoiding opinion, calibrating language; Gulf-specific sensitivities in report writing	Writing Workshop	—
10:30–10:45	Break	—	—	—
10:45–12:00	Feedback Report Lab	Each team drafts a 1-page feedback report section for Gulf Excellence Co. (Criterion 4). Peer review using the EFQM feedback quality rubric. Best report read aloud and awarded bonus points	Lab + Peer Review	20 pts + 10 bonus
12:00–13:00	Lunch Break	—	—	—
13:00–14:30	Final Assessment Simulation	Full individual assessor panel simulation: each participant receives a new evidence pack, scores 2 criteria using RADAR, writes 3 strengths and 3 improvement areas,	Individual Simulation	50 pts (final)

<b>DAY 5</b>		<b>Feedback Report Writing, Full Simulation &amp; Certification</b>		
		presents findings to panel in 5 minutes		
14:30–15:00	<b>Break + Preparation</b>	Trainer marks simulations; participants prepare reflection and action plans	—	—
15:00–15:45	<b>Results, Awards &amp; Leaderboard Ceremony</b>	Final leaderboard announcement; badge and certificate distribution; Gold Assessor award; team awards; group photo	Ceremony	Awards
15:45–16:30	<b>Action Planning &amp; Close</b>	Individual "Assessor Action Plan" card: 3 commitments for applying learning back at work; program close; feedback forms; EFQM self-study path shared	Individual + Plenary	—

## Recommended Post-Training Study Path

13. **Week 1–2:** Read EFQM Model book Chapters 1–3 (WHY & HOW blocks). Re-score the Gulf Excellence Co. case independently.
14. **Week 3–4:** Read Chapters 4–5 (RESULTS & RADAR). Practice writing 5 feedback statements using EFQM language.
15. **Month 2:** Complete EFQM e-learning modules on RADAR scoring. Apply for a voluntary assessor role with your local excellence award body.
16. **Month 3:** Attempt the EFQM online Assessor certification exam. Target: 75%+ pass score.

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