

**Professional Qualifications**  
**Robert W. Jolliffe, MBA, B. Comm., FCMC**  
**Director**



***Novus Consulting Group Ltd.***

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Mr. Jolliffe provides professional services in the following areas:

- ***Strategic Management***, strategic business plans, business case development, performance measurement and improvement, organizational and human resources development, and safety program management;
- ***Marketing***, including market research, project feasibility, export strategies, and marketing plans;
- ***Productivity and Quality Improvement***, including organization-wide diagnostic assessments, total quality management, performance evaluation, business process re-design, and corporate turn around and;
- ***Operational Planning and Budgeting***, linking strategic objectives to functional and individual objectives, plans and budgets.

## **Background**

Prior to receiving his MBA in marketing and finance from Queens University in 1972 and then entering the consulting profession with the Coopers & Lybrand Consulting Group, Bob worked one year with Continental Can Company and then seven years with Du Pont of Canada's NYLON Plant. During that time he was engaged in both line management and staff positions that involved:

- Production planning and management;
- Product and process assessment, engineering, development and control;
- Maintenance coordination and planning;
- Team based productivity and quality improvement;
- Training, staff development and HR policy and safety program upgrading and application;
- Coordination of marketing/sales plans with product distribution;
- Project feasibility studies; and
- Warehousing and distribution management.

Since entering the management consulting profession in 1972, managing his own firm since 1984, and then co-founding The Novus Consulting Group Limited in 1997, Bob expanded the depth and breadth of his consulting expertise and experience in:

- Strategic and business planning;
- Performance measurement and evaluation systems;
- Marketing research and detailed marketing plans;
- Organizational assessment, restructuring and development, and human resources leadership;
- TQM: productivity/quality improvement, including Business Process Re-engineering;
- Operational planning, including financing and budgeting and ABC/M;
- Diagnostic services; and
- General business management and planning.

## Sector Experience

Clients represent small, medium and large companies and public organizations in sectors that include:

Electronics	Construction	Four Levels of Government
Structural Steel	Metal Fabrication	Mining/milling/smelting
Food Processing	Integrated Petroleum Industry	Textiles
Machine Shops	Hospital Equipment	Light & Heavy Manufacturing
Government Agencies	Electric Utilities	Pulp & Paper
Telecommunications	Not for Profit Groups	Economic Development
Education	Health Care	Transportation
Tourism	Software	Pharmaceuticals

## Work Experience

1984 – present	Principal	The Novus Consulting Group Ltd. and Jolliffe Management Consultants
1972 – 1984	Manager	Coopers & Lybrand Consulting Group
1964 – 1971	Production Manager	Du Pont of Canada's NYLON Plant
1960 – 1961	Quality Control	Continental Can Company

## Education and Professional Development:

- MBA, (Finance & Marketing), Queens University
- B. Comm., Sir George William's University
- 2 years Engineering; McGill University
- Certified Management Consultant, (1975)
- TQM/ISO courses at Technical University of Nova Scotia
- TQM/ISO program certificate from the Quality Productivity Initiative of InNOVAcorp.

Mr. Jolliffe was awarded the *Queen Elizabeth II Medal for the Export of Technology* for his work in introducing priority planning and budgeting (ZBB) to Australia - Unilever International Pty. Ltd. - and to England - British Oxygen. He is a Fellow Certified Management Consultant. The Institute of Certified Management Consultants of Atlantic Canada (ICMCAC) elected him to the fellowship honour for his service to the Profession, Institute and community. Bob is also a founding director and former president of ICMCAC. The ICMCAC certifies management consultants who have met rigorous education, examination and professional practice standards. As a CMC, Bob adheres to the Institute's strict Code of Professional Conduct.

Bob also served on the Halifax Metro Area United Way Cabinet Committee, on the United Way Budgets and Admissions Committee in Kingston, ON, and a volunteer in Kingston and Montreal, was a Team Leader for the Nova Scotia Lung Association campaign, and 15 years as a volunteer in the Canadian Ski Patrol System. He is a member of the Halifax Chamber of Commerce and the chair of the Chamber Transportation Committee's sub-committee dealing with people movement in HRM.

*Please see summaries of a sample of Bob's projects in his main service and discipline areas below:*

## **Strategic & Business Planning and General Management**

Bob's experience in this area covers the assistance to clients in developing detailed strategic and annual business operating plans, and offering general management advice to owners/executives as part of an ongoing assignment and on a follow-up basis. It also involves assessing business opportunities and projects and evaluating economic benefits of such.

**Feasibility Study and Plan for Anahid Hospitality Management Inc.** The Company was considering a significant re-capitalisation of a hotel it owns and manages. Before proceeding, the client engaged Novus to conduct a comprehensive feasibility study of two reconfiguration options: one to convert to a suites hotel and the second to an assisted seniors living complex. Bob project managed the assignment that included extensive financial trend analysis of the operations, and primary and secondary market research to identify business activity and trends in the area. We conducted a wide range of interviews of key stakeholders and informants in the public sector, business leaders, and operations managers of similar facilities. In completing a detailed SWOT analysis we prepared a series of specific action plans. We developed a network of scenarios and completed an NPV analysis using the company's target IRR. The results and our conclusions and recommendations were documented in our final report.

**Clean Annapolis River Project Society (CARP) Opportunities Identification.** CARP was formed in the 1970s to apply effort and environmental remediation and protection systems to the floral, fauna and water quality in Annapolis River watershed. CARP is a not for profit organisation with about nine full and part time employees and a few dozen volunteers. The CARP Board and Executive Director defined a strategic option to broaden the Society's operations by adopting a formal Social Enterprise structure. Bob was engaged to conduct primary and secondary research as a precursor to identifying possible social enterprise opportunities that would resonate with the strategic objectives and general interests of the Society. Part of the investigative process included completing a literature search, interviewing about a dozen social enterprise organisations across the country and abroad, and then developing a compendium of strategic, start-up, management and operational best practices. These served as a base for completing a SWOT analysis of CARP to both determine its readiness to undertake the move to a social enterprise and to identify possible business and structural opportunities for doing so. Finally the project concluded with planning and facilitating a group discussion composed of Board members, staff and volunteers. The group achieved results that included a ranked list of three business options that CARP could pursue, and agreement of key steps the Society needed to take in preparation of pursuing the Social Enterprise goal.

**Agnico Eagle Mines Limited Training in Priority Planning and Budgeting.** Novus was contacted by the Director of Mine Maintenance to help them in a strategic initiative involving improving their maintenance management process in their mines in Canada and overseas. The aims were to better control costs and improve overall effectiveness using Zero Based Budgeting. (This is a process Bob has worked on improving over many years and is now known as Priority Planning and Budgeting.) Bob was engaged as a first step to provide training. Bob developed a comprehensive, custom tailored training tool, which he documented and delivered to two Agnico senior officials.

### **Prepared the Processes and Facilitated Two Strategic Workshop Sessions for the Strategic Joint Regional Transportation Committee**

The Committee (SJRTC) was created in 2005 by the Halifax Regional Municipality and the Nova Scotia Government to keep abreast of transportation issues, including public transit, in the HRM region to provide advice and input to the five year strategic transportation plan, which is updated annually. Membership on the Committee is comprised of senior appointed officials in the HRM and Nova Scotia governments, the Halifax Gateway Council, the Greater Halifax Partnership, and the Chamber of Commerce. The purpose of the work shops were to first to brainstorm issues that the Committee is facing in ensuring it was effectively fulfilling its mandate. The second workshop was directed toward defining the key strategic initiatives that the Committee needs to undertake and to define steps to increase its effectiveness and profile of its operations in the community. Bob facilitated the two sessions and prepared minutes and a brief report on each of the workshops.

**Atlantic Provinces Community Colleges Consortium** Atlantic Canada's five college systems have considerable research capacity and capability; the goal of the study was to help the colleges to better leverage and focus these resources, and increase their level of collaboration with industry and universities. The consultant team conducted background research and interviewed a wide range of informants in colleges, both in Atlantic Canada and beyond, in universities, in industry, and in funding organizations. From this investigation key themes emerged which were consolidated into a comprehensive final report.

**Community Development Assessment and Plan in Advance of Wentworth 2011 Canada Games Events.** Worked with Don Shiner to identify and conduct assessments of relevant infrastructure and events in the community. Completed a series stakeholder interviews and best practices evaluations of organisation across North America. Developed recommendation and prepared an action oriented business plan.

**Strategic Assessment and Plan to Expand Digital Media and Creative Content Business in the Region For the Atlantic Film Festival Association:** Led a Multi-discipline project including, Don Shiner and a Toronto specialist sub-contractor to Develop a Strategy to Grow the Atlantic Region's Digital Media and Creative Content Sector. Work involved a series of depth interviews of stakeholders, industry participants, and best practices organisations. We also conducted a series of brainstorming sessions with samples of industry players in the region to test their opinions and views on an organisation that would be struck to help identify and facilitate alliances to pursue large international projects. Identified and assessed a number of governance and management structures for the proposed organisation to lead and manage this initiative. Prepared a short-term strategic plan to guide the development of the program and form the organisation for this undertaking.

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**Cumberland Regional Economic Development Association (CREDA).** Served as project manager to develop a five year strategic plan to identify markets and attract foreign investments in three industry sectors in the County. The work involved extensive primary and secondary research of markets in the U.S. and abroad. We conducted depth interviews of stakeholders including community leaders, funding partners, and executives of all firms represented in each of the three sectors. We also completed best practices reviews of economic development organisations in other jurisdictions and made contacts with business leaders outside the country to assess the potential for FDI. The work culminated in a comprehensive strategic and implementation task plan and budget, and a suggested branding outline for the Region...

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**For the Nova Scotia Office of Economic Development and ACOA, lead a project to assess the feasibility of forming a Nova Scotia Education and Training Association to market products and services internationally, and develop a strategic plan.** The work involved assessing the state of marketing international projects and attracting foreign students to the province among private and public sector educators and trainers. Identified key target market areas, developed a marketing strategy and plan, designed a formula for assessing member fees and financially supporting the association, prepared financial

forecasts, and recommended an appropriate governance and management structure. The work led to the formation of *EduNova*.

**Business Plan for Managing Regularly Scheduled Tall Ships Events In Nova Scotia for the Waterfront Development Corporation Ltd.**

**Summary:** Bob served as project manager and worked with his partner Don Shiner on the project. A new organization was established to manage Tall Ships and other events on behalf of the Province under the aegis of the WDCL. Key project elements included:

- Conducted extensive best practices assessments world-wide;
- Interviewed over forty key stakeholders including five members of the Board of Directors,
- Formalised the Province-wide aspect of the regularly scheduled set of events;
- The organisation was mandated to create a financial net return to the Province;
- Established a formal, dedicated financial management model and forecasts;
- Performed an economic impact assessment using the Province's Input/Output model;
- Established the management framework and outlined the business processes to manage the Tall Ships and other marine related events, including policies, roles and responsibilities, and high level performance targets;
- Designed and recommended a modified governance structure; and
- Developed operating and marketing strategies and a long-term business plan.

**York Sunbury Museum, Fredericton: Feasibility Study and Business Plan.** Bob project managed a team of a museum/arts specialist and architects to conduct a feasibility study for the future course of the York Sunbury Museum in Fredericton. The Museum is currently housed in an 18<sup>th</sup> century former Garrison Officers' Quarters, which while it has historical attractiveness, is unsuitable to effectively house a class "A" museum attraction. Admissions have been low and the Museum had not been seen as a high profile attraction. The City was keenly interested in seeing the museum become a major domestic visitor and tourist attraction, and lent support to seeing the Museum move forward.

The work involved creating a base line profile, conducting benchmark best practices assessments of similar facilities, and defining major needs and changes to the Museum housing itself as well as to the current governance and management structure. We also recommended a slate of commercial attractions that the Museum would need to help support its ongoing operating costs. We developed governance and management structure options, recommended the most suitable option and then prepared four year capital and operating cost forecasts, and developed a staged business work plan.

**For the Nova Scotia Department of Agriculture and Fisheries Developed Investment Information Prospectuses.** This work was directed toward assessing the state of four main sectors and developing sector profiles and investment prospectuses. Bob worked on the apple sector and identified investor contacts around the world.

**For ACOA, Halifax, acted as project manager and lead consultant to design and then lead a Pilot Program to assist SMEs to enhance export trade capacity using e-business tools - eEXPORT.** Our mandate was to design the program, participate in selecting 8 firms and direct the Pilot Program implementation. Work included coordinating the input of TTNS consultants from Industry Canada, Agriculture Canada, ACOA and NSBI. Our consultants provided customized, one on one counsel to the participating firms to assess their e-business and export trade readiness, identify export market interests, and to set strategies and plans to address upgraded and/or updated export and e-business initiatives. ACOA adopted and rolled out the eEXPORT Program across the province. The program was later expanded to become the broader focussed **Export Trade Mentoring Program**.

**For LakeCity Woodworkers,** completed an internal assessment, external market evaluation, and new product feasibility assessments, and worked with the management team of to develop a growth strategy, including an export marketing element, and three-year financial forecast and work plans.

**Strategy to market educational products and services internationally for the Humber Economic Development Board and Educational Strategic Alliance, Newfoundland:** Served as project manager and teamed with a Novus colleague to conduct detailed market research and prepare a strategic plan for marketing educational products and services internationally. The work involved assessing current best practices of education institutions across Canada and abroad, assessing opportunities for products and services to be offered based on the Alliance's strengths, and assessing and recommending target markets to pursue. We also recommended the management and governance structure to implement and manage the initiative, and prepared detailed action plans and financial forecasts. This project was interesting from the viewpoint that the Alliance was comprised of public and private secondary and post-secondary institutions in Western Newfoundland who banded together to undertake this educational and economic opportunity.

**Financial feasibility and appropriate governance and management structure of an HRM mixed-use waterfront development - Alderney Landing:** Novus directed this multi-disciplinary assignment on behalf of the Halifax Regional Municipality to conduct the evaluation. The key attractions of the complex included a theatre, events plaza, market, children's play areas, visual arts and crafts displays, retail shops, and other options. A central element of the engagement was to assess the optimum mix of attractions, develop traffic, revenue, and cost forecasts from which we evaluated the feasibility of proceeding with the development. We concluded the project to be feasible under certain financial and operational assumptions. We then developed and evaluated options for governing and managing the complex.

**Directed Priority Planning and Budgeting (ZBB) projects** in over eighteen organizations across Canada and overseas. These included Alberta Government Telephone, the City of Hamilton, Nova Scotia Power, the Government of Newfoundland and Labrador, and Andres Wines, and served as project management and technical advisor on the MT&T project. Bob also introduced this technology to Australia and the U.K. by training Coopers and Lybrand Consultants and acting as the expert advisor in the implementation of the process in Lever Brother International Pty. Ltd and a division of British Oxygen. The process calls for managers to define their responsibility for achieving elements of the corporate strategic objectives, to make improvements to their work processes and to articulate the services and benefits being provided at different levels of budget funding. Plan and budget submissions are prioritised and reviewed organization wide, and final funding decisions are made as a result of the priority setting and review process.

**Feasibility study of establishing an oil seed processing industry in P.E.I:** On behalf of the provincial government and Agriculture Canada, directed the research to determine the feasibility of this proposal. This involved assessing the overall world export market, the adaptability of provincial farming operations to produce the appropriate crops, and the cost-effectiveness of establishing a processing plant.

**Strategic planning and management structure process for the Nova Scotia Branch of Canadian Parents for French:** A significant aspect of the work required the development of business cases, three-year plans and budgets for their operation to support the application for a significant increase in funding that would enable the Branch to support chapter activities. The application was successful. Follow-up work involved developing management structure options and preparing position descriptions for new positions, preparing executive search advertising copy, and participating in interviewing candidates.

**Evaluated the state of strategic planning, policy structure, and the governance, management structures, and work processes for the Cosmetology Association of Nova Scotia.** Identified several improvement opportunities designed to differentiate the governance and management processes and to save considerable time and money by adopting changes. Issues addressed included the need to establish a code of ethics, to focus more intently on longer-term strategies and policies, and to rely more heavily on the administrative office to manage the day-to-day business of the Association. The Board accepted our recommendation and undertook implementation immediately.

**Assessed the costs and benefits of relocating the head office of an Atlantic Region firm:** Worked with a Novus Consulting Group colleague on behalf of Port aux Basques, Newfoundland to translate the results of the assessment into a strategic business case for the relocation.

**A detailed strategic and business plan, budgets and corporate policies** were developed in advance of what resulted in a successful start up for a new metal processing company.

**Analyzed the Dalhousie University costing and budgeting system to identify its strengths, weakness and opportunities for improvement.** Established an outline of a model for tracking direct and indirect teaching costs and university overhead. Analyzed the cost of funding research activities in some departments, and presented our findings and recommendations to implement a new planning and budgeting process that would tie into the University's strategy, to the vice president of Finance and other key officials.

**Investor information package:** For an established galvanizing plant, developed detailed business plans, and operational and financial forecasts, and information packages for presentation to potential investors.

**Facilitated implementation of a strategic planning process:** Trained senior executives of a medium sized road-building company in the process of strategic planning. Assisted them to develop an overall business plan and detailed operating plans and budgets.

**Organization study for the Nova Scotia Housing Commission:** The three objectives were to determine the most appropriate organizational form to carry out government's housing objectives, to develop appropriate organizational arrangements, and to identify management systems improvements, which could be implemented in the short term. Made recommendations on the form, structural arrangements and the governance structure of the organization. The four-member Cabinet Committee accepted our recommendations to adopt a government Department structure.

**Evaluation of the operations, marketing and purchasing practices:** For the Workshop Council of Nova Scotia conducted this project that involved 28 workshops throughout the province and prepared business plan guidelines.

**Organization and workload evaluation of the Corporate Secretary's Office:** Conducted this work on behalf of Sherritt Gordon Ltd. Identified and recommended revised responsibilities and task allocations for the Secretary and his staff.

**Facilitated the development of vision and mission statements and the strategic plan** for an Air Force Squadron in the Department of National Defense.

**Strategic planning project:** On behalf of the Centre For Women in Business at Mount Saint Vincent University, directed an engagement that involved working with the Centre's staff and management board in completing a comprehensive plan including operating objectives, plans and budgets directed toward providing seminars, training materials and counselling programs.

**General management and strategic marketing advice:** Worked with the president of a specialty manufacturing and reselling firm on a retainer basis to offer strategic and management advice. Assisted him and his senior executives in developing a mission statement, strategic domestic and export marketing objectives and a business plan. As well, provided guidance in several HR management issues including communications, safety and teamwork.

**Facilitated a brainstorming session** for the Architectural & Engineering Practice Institute on shifting paradigms in the design industry.

**Safety process management:** Advised management and staff in the process of establishing and sustaining a culture for sustaining effective safety programs which involve all levels of employees in organizations, and which requires a fully shared responsibility for adhering to safe practices.

## **Market Research/Marketing Studies and Plans**

Bob's consulting experience covers a wide variety and depth of marketing research, feasibility studies, industry assessments, and marketing plans.

**For ACOA conducted an assessment and profile of the state of the machining, precision machining and welding industry sector in Nova Scotia.** Interviewed a significant proportion of the firms in the sector, gained data on current available capacity and sales, and on plans for the next three years. The firms provided estimates of any facilities expansion, hiring, and future utilisation rates in their shops. This data was extrapolated to the whole sector to yield a current state and future profile.

**Participated in an assessment of the boatbuilding industry in Nova Scotia.** We identified the relative health of the industry, identified key opportunities, and hindrances to growth. We concluded by identifying a consolidated list of potential financial and other support among the various provincial and federal government departments and agencies.

**Export Mentoring for a number of food, agrifood, and industrial operations and services businesses.** Provided assistance and mentoring to over two dozen firms including Acorn Timber Frames, Rainbow Farms, JustUs Coffee Roasters, Eastern Protein Food, Spring Water, Kenomee Log Homes, and RKO Steel and Eddie Lemoine Consulting Inc.. Worked with the principals and senior marketing managers to assess export market potential, gather key market intelligence, identify opportunities and threats and to prepare foreign market entry/expansion strategies and plans for their products.

**For the Halifax Office of ACOA, project managed a Novus team to design and implement a pilot program to assist SMEs enhance their export trade initiatives through the use of e-business tools.** The project involved helping to select applicants to participate in the pilot project. We provided one-on-one counselling with eight companies to guide them to identify their e-business and export trade readiness and opportunities. The team counselled them to develop strategies in these areas to move their enterprises forward with improved business models. We also worked in cooperation with federal and provincial trade experts to raise the awareness among the participating firms of available services and information. Worked with a further nine companies under the eEXPORT and Export Mentoring program.

**Led the management team of Argo Protective Coatings Inc. to develop vision and mission statements and strategic priorities and objectives.** Assisted them update their marketing plan and assess their readiness to adopt an e-business model.

**Evaluated the market potential in Canada and the North East U.S.** for an emulsified fish lawn and garden fertilizer. Using databases, industry reports, interviews and mail-out research techniques, developed product/customer/market and pricing profiles, typical distribution systems and markets. Analyzed market entry barriers and the means of overcoming them. Developed business, marketing, sales and pricing strategies and plans.

**Evaluated the market potential and developed operating requirements** for the establishment of an aluminum can collection business. Developed a three-option business case for the proposed project.

**Conducted a market research and feasibility study to enter new product/markets for a specialty bakery.** The work involved defining the sales potential in existing and new product/customer markets. Analyzed government and industry statistics, and interviewed corporate and chain store merchandising managers across the country. Developed and implemented in-store customer research instruments and designed in-store promotion campaigns.

**Business and marketing planning:** Following a detailed market analysis for new products and markets for a manufacturing plant and for a retail operation, developed detailed business and marketing plans, and financial forecasts and budgets.

**Completed a detailed market assessment for a YMCA in Prince Edward Island** to determine the existing and potential demand for future services and facilities that the Y could provide. The work included extensive personal interviews, focus group discussions, and a statistically based telephone survey of Summerside and its catchment area. Developed different expansion options and recommended frameworks for a marketing and strategic plan.

**Researched the Canadian and U.S. markets for acquisition opportunities** for a major, multi-product industrial supplier. This involved accessing databases and identifying product families that best fitted the client company, identifying companies in those areas and confirming their product/customer/market profiles. A short list of candidates was selected and strategies prepared for approaching them.

**Conducted a research of the North American markets** for commercial fishing and industrial ropes and twines. Surveyed distributors and end-users situated on all of the continent's coasts. Evaluated distribution systems, pricing structures, replacement factors and market entry barriers. Developed a marketing strategy and plan, and three year sales projections.

**Directed the research to determine the feasibility of establishing an oil seed processing industry in the province** on behalf of a Maritime provincial government and the federal Department of Agriculture. This involved assessing the overall world market, the adaptability of provincial farming operations to produce the appropriate crops, and the cost-effectiveness of establishing a processing plant in the province.

**Conducted a three-phase market/project feasibility study** for a proposed hot dip galvanizing plant. The work involved accessing various databases to determine the overall profile of the market and suppliers in North America and Canada in particular. The detailed evaluation included mail out, personal and telephone interview techniques. The project culminated in a marketing and detailed strategic plan.

**Conducted a two-day seminar on export marketing** to business owners, managers and members of various government departments on behalf of the Business Development Bank of Canada.

**Completed a detailed market assessment, three-year strategic plan, budgets and a plan for hiring new staff** on behalf of a non-profit organization. Prepared position descriptions and assisted in interviewing new staff. The client was successful in acquiring new public sector funding based on the plan and secured highly competent staff because of their search process.

**For a "mini steel" plant entrepreneur, conducted an extensive research program to identify possible investors.** The work involved making personal contacts, conducting telephone interviews and evaluating databases. Selected a short list of interested parties and facilitated in the negotiations.

For several clients, **developed sales call plans** and assisted marketing/sales managers in this process. Completed several other market research oriented assignments on behalf of clients in sectors that include sheet metal fabrication, wood processing, and federal and provincial government development agencies.

## **Total Quality Management, Productivity/Quality Improvement & Business Process Re-Engineering**

Mr. Jolliffe's experience in production management, quality and productivity improvement and diagnostic activities began with his job at Continental Can Company in Montreal and was extended significantly during seven years with DuPont of Canada and an extensive variety of engagements in his consulting career. His approach is to blend traditional and modern techniques such as industrial engineering,

management/staff task forces, and TQM and others. Projects are usually initiated with a "look see" to identify immediate moves the client should make and to develop our detailed approach. Bob's work in this area has involved healthy and financially troubled companies.

**For a large Nova Scotia toy manufacturer, mentored the company's intern trainee to identify key operations problems and set improvement action plans.** Through discussions with the intern and with the president, coached the intern to conduct administrative operational assessments, evaluate and identify communications and information sharing issues with their Chinese manufacturer, and to define key components needed in their contract with their agent in China. Coached the intern in his developing an implementation action plan.

**Trained and helped several clients' managers and staff to implement Total Quality Management.** These engagements involved establishing quality and productivity improvement objectives, coaching task force teams of managers and operators in work process analysis, problem solving, and work flow charting and implementation techniques. Assisted in the implementation and in monitoring the results.

**Conducted a diagnosis of the operations of a survival gear manufacturer.** The work led to establishing a staff-employer cooperative approach to productivity and quality improvement that employed TQM TECHNIQUES. Team driven improvement projects resulted in a reduction in the unit production time of over 25% and a substantial reduction in reworked units.

**Assisted a metal fabricating and machine shop to upgrade their scheduling and control systems,** to adopt productivity measures, and to improve their financial planning and control techniques. In a separate project, trained employees in TQM techniques and then involved employees in problem identification, solving and solution implementation. The project was directed toward improving the quality of work in process and the final product.

**Business/Work Process Redesign:** For a newly amalgamated company, trained a team of management, sales and shop staff in Business Process Reengineering techniques and facilitated the initial analysis and problem solving meetings of the team. The president extended the process to the administrative staff group with success.

**Coached management and staff in the use of work process re-engineering and TQM concepts** in over 15 private and public sector organizations. The work required managers and staff to "rebuild" their organizations and work methods, redefine their services, document improvements and to embed the changes in their plans and budgets. The processes were driven by strategic plans and improvement objectives.

**Assessed work planning and control practices** in a technology-based company and identified opportunities to improve the management and productivity of the professional staff group.

**Conducted "sick company" assignments for a structural steel and heat exchanger fabricator in Calgary, and a rope manufacturer in Halifax.** After completion of a quick diagnosis, cash control and upgraded estimating and inventory reduction programs were installed. For a brief period, the presidents ceased cheque-signing duties. Prepared proposals for negotiations with the bankers.

**Conducted a comprehensive diagnosis of the management and operating systems for a food wholesaler,** including warehouse layout, stocking, order picking, sales routing, staffing, financial control and fleet maintenance practices. Our recommendations were implemented and the company reversed a significant loss position to one of an equivalent profit in three months.

**Conducted several management and operations diagnoses** for companies including a battery manufacturer, a structural steel fabricator, parking control systems manufacturer, ship repair yard, a sign

manufacturer, a toy manufacturer, and a supplier of manufactured and stock material for the shipping, mining and construction industries. In all cases, some short-term improvements were made and recommendations and plans were developed to address several problems in areas that ranged from product quality and manufacturing productivity, to information flow, management practices, marketing, and production and process planning and control techniques.

**Conducted a diagnosis of a food company's operations** that focused on its distribution and manufacturing areas. Developed a series of recommendations that addressed the company's quality control practices, productivity, and marketing and distribution methods.

**Led several employee quality and productivity improvement task force sessions** in a chemical plant. One example of the results was an improved quality inspection routine that was more statistically accurate than the one in force. It also yielded an annual staff savings of more than four person years.

**Implemented several service improvement and cost reduction projects** for a mining, milling and smelting operation. For example, the surface rail system manager felt he provided superior service: his internal customers could call on him in a moment's notice. By having his customers plan their work and give advance notice to the rail operators, two engines were eliminated saving of over \$275,000 per year.

**Conducted several productivity improvement projects** that were sponsored by the Nova Scotia Department of Development and CEIC. These involved establishing and training joint management/employee committees to work cooperatively in identifying and implementing improvements. The assignments began and were interspersed with training sessions, the concepts from which were then applied by the clients' employees. Assistance was provided in the implementation of changes.

**Conducted a complete diagnosis of a contract exploration drilling profit centre of Anaconda Mining Ltd.** The project involved directing a full analysis of the financial operations and conducting in-field assessments of projects being conducted in the Western U.S. Recommended to shut the profit centre down because of inappropriate use of the wrong equipment and inexperience in managing the business.

In both sound and troubled economic times, we firmly believe that organizations need to embed productivity management in their strategy and daily operations. Of particular importance in our assistance in TQM processes, is our practical experience, backed up by years of assisting clients in implementing these techniques. Through our association with other colleagues, we are also able to provide a range of disciplines that includes certified ISO 9000 auditing and implementation counselling.

## **Performance Measurement & Organizational Development**

Bob's work in this area has included assessments of organisational and process performance, developing improvement processes and techniques and conducting reorganization and merger projects for clients such as the City of Hamilton, Gulf Oil Canada Limited and the County of Peterborough. He has conducted other training and organization development work, which covers assessments, consensus building and training for new organizational structures. The training covers the conduct of specific training courses; client training as a precursor to implementation assignments; and ongoing formal and informal training as elements of major assignments. His expertise has been applied to both private and public sector clients. As well, he has worked with several organizations in organizational effectiveness and efficiency improvement projects.

**Performance measurement systems and standards development:** Trained senior managers in several private and public sector organizations in developing performance measurement systems, and setting objectives and performance standards that tie in with strategic objectives. The work also included coaching clients' staff in conducting performance appraisals and setting personal development programs.

**Counselled owners of Ergoworks in addressing management and organisational issues.** Developed a work plan and process to undertake to define and implement improvements.

Worked with Ernst and Young on the **needs assessment and planning for the development of revised human resources policies and procedures** for the Victoria General Hospital.

**Designed performance measurement processes and incentive programs** for a metal fabricator and for a safety gear manufacturer. Reviewed existing compensation policies, researched various incentive schemes, and designed performance measurement processes and incentive programs for the companies' employees.

**Developed a human resources strategy and development plan and management systems** for a start-up metal processing plant in Dartmouth. The assignment included establishing training programs, policies and procedures, succession planning, and preparing position descriptions.

**Established HR policies and procedures and detailed position descriptions, performance review systems and compensation policies** for a food processing plant.

**Job evaluation:** Trained in-house HR teams from brewery and mining companies in developing job descriptions and in conducting job evaluations.

**Developed marketing policies and procedures, established marketing managers' position descriptions, objectives, performance standards,** and annual and monthly plans.

Conducted **executive searches** for positions including marketing, operations and maintenance managers.

**Reviewed existing human resources policies and procedures:** Participated in company-wide policy and procedures reviews with a view to reducing the verbiage and simplifying the policies so that they were more open to case-by-case interpretation and application.

**Designed and led a team building training workshop** for the Canadian Employment and Immigration Centre Halifax Metro Area managers. This project involved conducting a needs assessment and developing course materials. The main workshop elements included lectures, in class exercises and leading the group in defining workplace projects that would help entrench the notions discussed in the workshop in the managers' daily routines.

**Management operations audit:** Participated in association with the Coopers & Lybrand Consulting Group, on the management audit of the Nova Scotia Department of Education. The work addressed several issues including management practices, program evaluation, decision-making processes, and work process re-engineering opportunities.

**Developed and conducted a workshop training program on meeting service and cost objectives** for the Canadian Association of University Business Officers.

**Conducted an organizational effectiveness and efficiency study of the Regional Office of Parks Canada.** The work addressed issues of service planning and delivery within the Regional head office and the working relationships between this office and the field operations. Several recommendations were made and acted upon in regard to organization structures, services consolidations and work process improvements within the head office.

Assisted managers in the Retail Sales Tax Branch of a provincial department to **assess and implement improved service levels.** This involved training the managers in assessment techniques, and helping them establish assessment and measurement instruments.

**Prepared and presented three training modules for the Society of Management Accountants** across Canada. The courses covered new budgeting techniques and controllership.

**Trained senior practitioners in the consulting groups of Coopers & Lybrand in Australia and the U.K. in "zero base budgeting" techniques.** These projects involved setting training sessions for the consultants and their clients, and assisting the consultants to train clients and to implement the process.

Conducted a **training program for a professional sales association** on the topic of increasing the rate of return on selling activities.

## **Community Economic Development**

**Led a Project to Develop a market Identification and Attraction Strategy for CREDA.** The project focussed on assessing the potential and developing the strategic approach to attract Foreign Direct Investment to three business sectors in the region – Aerospace, Warehousing and Distribution and Metal Fabrication.

**For ACOA, led a project to assist SMEs to enhance their business through export trade by employing supporting e-business tools.** Guided the firms in assessing their status and in developing strategies and plans.

Directed a multi-disciplinary consulting team to **conduct a financial feasibility and management structure study** of the Downtown Dartmouth Waterfront Development Project on behalf of the Halifax Regional Municipality. The project components included a theatre, outdoor events plaza, visual arts and crafts exhibits, children's' play areas, vendor operations, a pub and a skating path.

**Mainstreet Project in the Town of Kensington, P.E.I.:** Provided support on a project directed by Heritage Canada, by assessing and making recommendations on the strategic and detailed marketing approach and plan for the Town to upgrade its attractiveness to business and tourists.

**Evaluated the potential and best use applications for the development of a plot of industrial land** on behalf of the Halifax County.

On behalf of a municipality, conducted a **detailed study of the costs and benefits of relocating the head office of a publicly funded transportation company** to the municipality.

*In summary, the key features of Bob's management consulting practice and experience include:*

- A broad spectrum, general management approach supported by;
- Expertise in several key areas of the management process which is;
- Backed by a breadth and depth of experience in a wide variety of client organizations and situations; and founded on
- Eight years experience in industry prior to becoming a consultant.