

The Boshe Group

REPORT TO THE GREAT SOUTHERN DEVELOPMENT COMMISSION



MENTORING FOR LIGHT INDUSTRY OWNER/MANAGERS IN THE GREAT SOUTHERN

*A project to build the capacity and market share of the region's
Manufacturing and Light Engineering Industry*

**Funded by DEWRSB through the
Small Business Enterprise Culture Program**

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1 EXECUTIVE SUMMARY

1.1 Background

The Great Southern Development Commission (GSDC) has worked in close consultation with the light manufacturing and engineering industry in developing this project with twin aims: to strengthen its capacity and broaden its scope.

A pre-feasibility study, funded by the Department of Employment, Workplace Relations & Small Business (DEWRSB) and the GSDC into the constraints faced by the industry identified that the key areas of support that were required were assistance with marketing and with the financing of new products and inventions. It showed that an informal network had already developed in this industry and that this could be built into a powerful force in promoting excellence and developing economic activity and employment in the region.

To address the recommendations of the pre-feasibility study, the GSDC developed an innovative 6-month mentoring program, attracting \$57,345 from DEWRSB through the Small Business & Enterprise Culture Program.

1.2 Aims

The mentoring project aimed to assist businesses in the manufacturing and light engineering industry to:

- Review their day-to-day operations
- Provide guidance on options for improvement
- Advise of cooperative opportunities, and where appropriate
- Assist with getting their new products and inventions to the marketplace

The range of business at which the program was aimed included:

- General engineers
- Engineers and manufacturers producing a range of innovative equipment and machinery for the agricultural, viticultural, marine, timber and transport industries

1.3 Objectives

The objectives of the program were to:

- Lift the capacity of the light manufacturing and engineering sector in the region
- Support existing businesses to improve their share of the marketplace
- Strengthen the existing informal network and opportunities for cooperation
- Target new products and inventions that will attract investment into the industry

1.4 Program Activities

The main steps and activities in the program were:

- Identification of Mentorees: This was undertaken by the GSDC. Of the 12 mentorees that were eligible for the program, 9 came from the Albany region, 2 from Kojonup and 1 from Katanning.
- Appointment of the Lead Mentor: The tender was publicly advertised, fulfilling GSDC policy and DEWRSB contractual obligations. Richard Webster of The Boshe Group was

appointed as Lead Mentor with responsibility for overseeing and coordinating the activities of the mentors.

- Selection of the Mentor Panel: A panel of skilled and experienced mentors was selected. Four of these were matched with the mentorees.
- Matching the Mentors and Mentorees: Mentors and mentorees were matched according to the needs of the mentors and the skills, qualifications and experience of the mentors.
- Induction program: Three sessions were held – one for mentorees, one for mentors and a combined session at which the mentorees were introduced to their mentors.
- Mentoring activities: The mentors followed this 3-stage process, but were allowed considerable flexibility in the provision of these services so they could best suit the needs of their mentorees.
 - Stage 1: Assessment and Situation Analysis
 - Stage 2: Identifying and Reviewing Options for Improvement:
 - Stage 3: Guidance During Implementation

In most cases it was found that more time was required for the first two stages than had been planned, and that these stages identified a larger-than-expected number of internal issues (within the business) that needed to be addressed before external issues, such as market development, could be addressed

- A series of ‘Management Development Briefings’: Nine of these were held with a range of guest speakers, providing the mentorees with a mix of learning and networking opportunities. These evenings were well attended, although it was not possible to select a day and time that suited everyone.
- Field Day in Katanning: This was initiated by one of the mentorees and was titled *Towards Engineering Solutions in Rural Towns*. It focused on the issue of salinity and was well attended by mentorees, mentors and public sector representatives.
- ‘Wrap-up’ session: This provided valuable insight into the benefits that the mentorees had obtained from the program and their high level of satisfaction with the program activities. The mentorees expressed considerable support for the continuation of the program in order to capitalise on the momentum that had been developed.
- End-of-Program Evaluation: An evaluation questionnaire was completed by all of the mentorees. This confirmed their satisfaction with the delivery of the program and their high level of interest in continuing with the program activities. The mentorees sought government assistance with the continuation of the networking activities in order to build the strength and capabilities of the industry cluster that has been established, but did not expect the government to continue to pay for the services of the mentors. In fact, several had already made arrangements for their mentors to continue at their own expense.

1.5 Program Outcomes

The End-of-Program evaluation and other feedback from the mentorees indicate that this has been a very successful program in terms of its defined objectives. The evaluation survey showed that:

- Despite the dramatic downturn in demand for engineering services from the agricultural sector, which badly affected several of the businesses, most of the mentorees had either increased their sales turnover, or at least ‘stayed the same’.
- Most were now more confident about the future and felt their personal capabilities and skills were stronger/better than they were at the beginning of the program.
- Most expected to expand their business activities in the next 12 months and felt they had a better network of contacts in light engineering and manufacturing in the region than they had at the beginning of the program.

2 BACKGROUND

This project follows-on from a pre-feasibility study into the constraints being experienced by the light engineering and manufacturing industry in the Great Southern region. The pre-feasibility study showed that a strong network exists among light engineering companies in the region and that the key areas of support that were required were in regard to the marketing and financing of new products and inventions.

In response to these needs, the Great Southern Development Commission (GSDC) designed a program to provide mentoring support to owner/managers of manufacturing and light engineering businesses in the region.

The GSDC sought and obtained funding support for this program from the Federal Government through its Small Business Enterprise Culture program (SBECP). The SBECP is an initiative of the Federal Government which aims to foster growth of small business by improving the capacity of small business owner/managers to access skills development and mentoring services which meet their needs.

3 AIMS

The mentoring project aimed to assist businesses in the manufacturing and light engineering industry to:

- Review their day-to-day operations
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- Assist with getting their new products and inventions to the marketplace

The range of business at which the program was aimed included:

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4 OBJECTIVES

The objectives of the program were to:

- Lift the capacity of the light manufacturing and engineering sector in the region
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- Strengthen the existing informal network and opportunities for cooperation
- Target new products and inventions that will attract investment into the industry

This provided a good fit with a key objective of the GSDC, which is to assist the business community in achieving its economic potential by pursuing opportunities for regional enterprise development, with a focus on value-adding, job creation, innovation and excellence and preparation for export. This program also complements the roles of the Albany Business Enterprise Centre, which supports skills development and improvement programs for individual businesses, and the Albany Chamber of Commerce & Industry, which has been supporting local businesses and representing the business community for over 100 years.

5 ACTIVITIES IN THE PROGRAM

The main steps and activities in the program were:

- Identification of Mentorees
- Appointment of the Lead Mentor
- Selection of the Mentor Panel
- Matching the Mentors and Mentorees
- Induction program – for Mentors and Mentorees
- Mentoring activities
 - Stage 1: Assessment and Situation Analysis
 - Stage 2: Identifying and Reviewing Options for Improvement:
 - Stage 3: Guidance During Implementation
- A series of Management Development Briefings
- Field Day in Katanning
- Wrap-up session
- End-of-Program Evaluation

These steps and activities are described in more detail in the following sections. As this was in the nature of a pilot program, the procedures used in the program have been fully described.

6 IDENTIFICATION OF MENTOREES

This was undertaken by the GSDC. All likely businesses in the engineering and light manufacturing sectors were contacted and this was supported by a publicity campaign about the program. It was advertised in the Great Southern Herald and the Albany Advertiser, and a mail-out was sent to 50 companies on the GSDC industry database (sourced in cooperation with local government agencies, business enterprise centres and chambers of commerce.)

A total of 12 suitable mentorees were selected, with 9 being from the Albany region, 2 from Kojonup and 1 from Katanning. This included 9 of the 10 businesses that participated in the initial pre-feasibility study, which resulted from the Regional Opportunities Audit funded by DEWRSB.

7 APPOINTMENT OF THE LEAD MENTOR

The tender was publicly advertised, fulfilling GSDC policy and DEWRSB contractual obligations. A committee was appointed to select the Lead Mentor and the panel of mentors, and to participate in the matching of the mentors and mentorees. This committee comprised:

Sally Haigh – GSDC
Maynard Rye – GSDC
Gary Wilson – Wilsons Machinery (industry representative)
Mike Westerberg – Westerberg Marine (industry representative)
Peter Bassett – Albany Engineering (industry representative)

Richard Webster of The Boshe Group was appointed as the Lead Mentor for the program.

The role of the Lead Mentor was to:

- Allocate work and supervise the activities of the panel of mentors that were appointed – ensuring the mentoring assistance was of the highest possible standard, resolving any issues that arose, ensuring timing is adhered to.
- Participate in the mentor-panel selection process – ensuring that the panel has an appropriate range of complementary skills and experience
- Participate in matching suitable mentors with the participating organisations – in the context of their individual needs and styles.
- Provide ongoing support and guidance to the panel of mentors – calling on the specialised skills and experience of other mentor-panel members if required.
- Provide a consultation point for all of the participants – thus keeping a watching brief on progress and the fulfilment of expectations, as well as helping to resolve any issues that may arise.
- Provide regular reports on the activities of the mentors and the progress of the project against pre-set milestones. (Monthly liaison with GSDC, quarterly written report on outcomes).
- Provide a single communications pathway between the GSDC and the project participants – mentors, mentorees and any other stakeholders that may emerge.
- Identify opportunities to strengthen the industry cluster and make recommendations to the group.

8 SELECTION OF MENTOR PANEL

A list of potential mentors was developed from/by:

- Inviting appropriate consultants from The Boshe Group's extensive network.
- Advertising by the GSDC in the local media.
- Consultants who responded to the main tender and expressed an interest in becoming mentors.

These consultants were sent a questionnaire (see Attachments 1 & 2) on which they could record their particular skills and experience.

They were also sent a project outline (see Attachment 3) which detailed the program objectives, methods and remuneration.

A panel of mentors was selected from the responses that were obtained.

9 MATCHING PROCESS

The mentorees were sent a very similar questionnaire to the one sent to the consultants, and were asked to use this questionnaire to indicate the areas and issues in which they believed they needed most support (Attachment 4).

The two sets of questionnaires were used as a basis for matching the mentorees with appropriate mentors.

The matching was undertaken by a committee comprising:

Mark Jessop – The Boshe Group (representing the Lead Mentor)
Sally Haigh – GSDC
Maynard Rye – GSDC
Gary Wilson – Wilsons Machinery (industry representative)
Mike Westerberg – Westerberg Marine (industry representative)

The results of this matching process were as follows:

Mentoree	Mentor
Gary Wilson – Wilsons Machinery	Neal Shoobert
Ray Woonings - Wallace Engineering	Neal Shoobert
Richard & Lenore Cooper – South Coast Fabrications	Steve Brown
Hans Fleck – Hans Fleck Engineering	Steve Brown
Barry Bowman – BC Steel Fabrications	Neville King
Barry Smith – Loadtek	David Hall
Mike Westerberg – Westerberg Marine	Steve Brown
Gus Hook – Bakers Junction Machining	David Hall
Peter Bassett – Albany Engineering Company	David Hall
Colin Campbell – Hi-Way Sales & Service	Neville King
Chris Radford – CGS Engineering	Neville King
Chris Speight – Aq2 Pty Ltd	Steve Brown

The mentorees were introduced to their selected mentors at the final workshop in the Induction Program.

10 INDUCTION PROGRAM

The objective of the induction program was to introduce both mentors and mentorees to the mentoring process – and important part of which was to clarify their expectations. This was undertaken in three workshop sessions, one for mentorees, one for mentors, and a combined session for both mentors and mentorees (at which the ‘matched’ mentors and mentorees were introduced to each other). Attendance at these sessions was a compulsory requirement for program participants.

The induction program was presented by Barbara Helsby of Albany Worklink and was universally considered to be a valuable exercise.

11 MENTORING ACTIVITIES

The support provided by the mentors worked through three main stages, as follows:

11.1 Stage 1: Assessment and Situation Analysis

This involved a wide ranging review of the existing activities of the business and its operations, with a special focus on identifying problem areas – weaknesses, constraints, impediments – both from an internal perspective (within the business) and an external perspective (industry, business environment). Where the business had undertaken some

formal planning activities, such as the compilation of a Business Plan, these provided a foundation for the review. The 'needs and issues' questionnaire also provided a starting point for this assessment work.

At the end of this stage the mentor and mentoree had typically identified and agreed on the issues that need to be addressed and developed some preliminary options for improvement.

11.2 Stage 2: Identifying and Reviewing Options for Improvement

During this stage the mentor and mentoree developed and reviewed a range of options for improvement, and through discussion and analysis, allocated priorities and sharpened the focus of the improvement activities that needed to be undertaken. This was summarised into an Action List that defined the tasks, costs and time-lines involved. Priorities were allocated to these tasks, based on their importance to the future of the business, the costs that would be involved, the amount of work involved, and their achieve-ability.

11.3 Stage 3: Guidance During Implementation

In this stage, the mentor provided guidance and encouragement to the mentoree while the improvement activities were being undertaken. In providing this guidance, an important part was to ensure that the mentoree adhered to the agreed action plan – in terms of strategic direction, budgets, priorities and timing. The mentors also played an important role in maintaining their mentorees' enthusiasm and commitment.

11.4 Level of Service

The mentors were available throughout the duration of the program for consultation with the mentoree. This was achieved by means of regular monthly meetings, supplemented by less formal contacts and telephone calls.

The contracted schedule of contacts involved a minimum of 6 meetings between the mentor and mentoree during the duration of the program, each of between 4 and 8 hours.

In practice, it was found that most mentors provided more frequent contact and a greater commitment of time to their mentorees, especially during the initial stages of the program (when it was typically found that that more time was needed for the assessment and action planning stages).

In addition to the time spent in consultation with the mentoree, the mentors also spent time undertaking some or all of the following tasks:

- Preparing contact reports (see Attachment 5). An important part of this report is the Action List – which lists the tasks they have agreed will be undertaken by the mentor and mentoree before their next meeting.
- Reviewing progress with the Lead Mentor
- Analysing information provided by the mentoree (eg. financial information, market information, business plans)
- Assisting with market development activities

12 MANAGEMENT DEVELOPMENT BRIEFINGS

The objectives of this element of the program were to support the implementation stage by means of a series of skills development sessions and to provide regular networking opportunities. These sessions were called Management Development Briefings.

A list of topics for these skills development sessions was developed to fit the specific needs of the mentorees, and for this reason this was done after the first meetings in the assessment stage had been completed. To assist in doing this, a questionnaire was circulated to all mentors and mentorees, listing a wide range of possible topics. It was found that most of the assistance and skills development that was required had an 'external' focus (e.g. marketing, exporting, tendering) rather than an 'internal' focus (e.g. process improvement, manufacturing issues, systems).

The Management Development Briefings were (mainly) held every second Tuesday evening and each took about 2-3 hours. In addition to the skills development component, an important part of the evening is to facilitate networking between the 12 mentorees. The mentors were also encouraged to attend, and most sessions had at least one mentor in attendance. The Lead Mentor also attended three of the sessions.

Attendances were very good with about 75% of the mentorees attending each session. Several of the mentorees routinely brought their business partners and/or senior managers with them to the sessions. Thus, about 12-14 people attended each of the sessions. Refreshments were provided and were paid for by those who attended.

The opportunity for networking between the group was well received and for this reason the amount of time allocated to this was increased in the later sessions.

The topics and speakers used for the Management Development Briefings were as follows:

Date	Topic	Presenter
Session #1 14 th August	Exporting – exporting principles apply to selling your products to anywhere outside of the Great Southern. The benefits and the drawbacks, some do's and don'ts. Think Big – use your network to form a consortium to go after bigger contracts.	Richard Webster David Hall
Session #2 28 th August	Better Tendering – playing the tender game, how to get on the tender list, how to prepare your tender, and how to win tenders. How to estimate prices – there are other better ways than using 'cost plus' to decide on prices.	Neville King N.King & Assoc.
Session #3 11 th September	Using the Internet – Introduction to how to use and get value from the Internet. Review the possibility of using the GSDC website and Gateway. (At Albany Worklink's premises at 56 Serpentine Road)	Barbara Helsby Albany Worklink
Session #4 25 th September	Target Marketing – build an effective sales campaign based on sound marketing strategies. Take a proactive approach to identifying prospects and meeting their exact needs. Build better customer relations – it's easier to keep a customer than find a new one, so build a customer database and use it to best effect.	Krysta Guille Grass Roots Marketing

Session #5 9 th October	Better Management Practices: Part 1. Make better use of your time; when and how to delegate; build a strong service culture; improve staff loyalty, commitment and performance.	Kay Geldard Albany Business Centre
Session #6 30 th October	Marketing: Cost effective alternatives to advertising. Alternative ways to promote your products and services and reach your target markets.	Mike Whittington
Session #7 13 th November	Better Management Practices Part 2. Time management (cont) - performance appraisals, communication, and teamwork.	Kay Geldard Albany Business Centre
Session #8 27 th November	'Wrap Up' session – review of the Program and a discussion of Next Steps. Also, a brief review of commercialising new products and inventions – all the steps in turning an idea into a product, how to find the capital, etc.	Richard Webster David Hall Neville King
Session #9 11 th December	Protecting Intellectual property. All the different ways you can protect your IP, pros and cons of each types, costs, etc.	Errol Harwood Wray & Assoc.

Note: Session #9 was an extra session held in response to requests from the mentorees, and was thus out of sequence, being held after the formal wrap up session.

13 FIELD DAY

A successful field day in Katanning was initiated by mentoree Chris Speight. Titled *Towards Engineering Solutions in Rural Towns*, it was attended by 6 mentorees, 2 mentors and representatives from the Department of Agriculture's Rural Towns Program, Shire of Katanning, Water Corporation, Great Southern Area Consultative Committee and the GSDC.

14 'WRAP-UP' SESSION

A formal 'wrap-up' session was held on a Tuesday evening towards the end of the program. Spouses and partners were invited, and several mentorees brought their senior managers. This session was very well attended. All but one of the Albany mentorees attended, as did the Katanning mentoree. The two Kojonup mentorees and the remaining Albany mentoree were visited earlier in-person by the Lead Mentor so their views were canvassed at that time. In addition, the Lead Mentor, 2 of the mentors, and a GSDC representative attended the session.

The objectives of the session were:

- To obtain feedback on the outcomes and benefits of the program.
- To review the processes and system that were used and consider how these could be improved in future programs of this type.
- To obtain ideas and suggestions as to how the momentum could be maintained (if this was what was wanted).
- To provide another opportunity for networking between the mentorees.

Key issues and feedback from this session included:

- All of the participants felt that the program had been well worthwhile and that they had received good value from it.
- They generally felt the balance between the one-on-one mentoring support and the group activities was correct. Each element was important and complemented the other.
- Some suggestions as to how the program might be improved if it were to be repeated elsewhere – specifically having more mentoring time available in the early stages.
- There was a strong commitment to continuing with the engineering ‘cluster’ that had been developed. A range of suggestions were made as to how the group could continue their networking activities, such as newsletters, regular meetings, and visits to each other’s premises.
- There was a good level of interest in continuing to use mentors. Several of the mentorees had already made arrangements to continue with the services of their mentors at their own expense. However, they generally required less intensive mentoring now that they were at the implementation stage and their directions had been set.
- They felt they needed ongoing assistance to help them expand their market coverage outside of their immediate geographic area and to win larger contracts. Several suggestions were made as to how the GSDC could help in this regard, such as supporting the services of a ‘job chaser and coordinator’. The role of this individual would be to search out work opportunities for the cluster, from a wide geographic area, including government contract work. The job chaser would focus on large projects and have a role in forming consortia and coordinating their activities.
- An idea was put forward to establish a prize and locally based venture capital fund to support the commercialisation of local inventions. (See comments at the end of the next section for a more detailed explanation of this idea.)

15 END-OF-PROGRAM EVALUATION

In order to assess the mentorees’ view of the program and its outcomes, a questionnaire was sent to the mentorees at the end of the program. (See Attachment 6 ‘Program Completion Questionnaire’). All 12 mentorees completed and returned the questionnaire. The tabulated results are as follows:

Key Performance Measure – Number of Employees

Although overall employment numbers were up, there has been a trend from full-time to part-time and sub-contract labour. The small reduction in full time employees is largely due to the downturn in the agricultural sector caused by adverse seasonal conditions.

No. of employees in your business -	At the beginning of the program? (end of May)	At the end of the program? (end of Nov)
Full-time (including yourself)	71	67
Part-time	10	15
Sub-contractors (if relevant)	2	5
Total	83	87

Key Performance Measure – Sales Turnover

Nearly all of the mentorees had either increased their sales turnover or held the same level as they had at the beginning of the program. Only one of the mentorees reported that sales turnover had decreased (a business that was heavily dependent on the rural sector).

Compared to your situation at the start of the program (end-May) has your sales turnover -	No.
Increased (<i>reported as 10%, 20%, 30%, and 'unsure'</i>)	4
Stayed the same	6
Decreased	1
Other (<i>'still establishing'</i>)	1
Total	12

Future Confidence

Most mentorees were now more confident about the future of their business than they were at the beginning of the program.

Compared to how you were at the beginning of the program in May/June, how confident are you now about:	Less confident	Same as before	More confident
The overall future for your business	0	5	7
The future profitability of your business	0	5	7
The ability of your business to withstand market fluctuations	0	8	4
The competitive strength of your business	0	5	7
The financial strength of your business	0	8	4

Personal Capabilities and Skills

Most mentorees now rated their personal capabilities and skills as stronger/better than they were at the beginning of the program.

Compared to how you were at the beginning of the program, how do you now rate your personal capabilities and skills for:	Weaker/ Not as Good	Same as before	Stronger/ Better	Don't know
Making the right decisions about your business	0	4	8	0
Planning for the future of your business	0	3	9	0
Handling the day-to-day issues in your business	0	4	7	1
Handling staffing matters like selection, training and development	0	9	3	0
Managing your time effectively	0	6	5	1
Handling the marketing aspects of your business	0	4	8	0
Handling the financial aspects of your business	0	7	5	0
Handling the operational aspects of your business	0	8	4	0
Handling the cost control aspects of your business	0	7	5	0
Handling the ownership/governance/legal aspects of your business	0	8	4	0

Business Management Perspective

Most mentorees reported they had a better perspective of the future of their business, had a well-defined action list, a well-developed network and a good understanding of how to develop new products and services.

Compared to the beginning of the program, would you now say that you:	Not as good	Same as before	Better	Other
Have a clear vision of the future for your business	0	5	7	0
Have a well-defined 'to do' list (action list)	0	4	8	0
Have a well-developed network of contacts in light engineering and manufacturing in your region	0	3	9	0
Have a good understanding of how to develop and commercialise new products and inventions	0	4	7	1

Business Outlook

Most mentorees expected to expand their business activities in the next 12 months. None expected they would contract.

In the next 12 months do you.....?	No.
Expect to expand your business*	8
Expect to stay 'as is'	3
Expect to contract	0
Don't know	1

**Most expected expansion of 10-20%.*

Staffing Needs

Four of the mentorees expected they would hire additional staff in the next 12 months. Only one expected to retrench staff and this was because they were currently over-staffed.

In the next 12 months do you.....?	No.	If so, how many?
Expect to hire additional staff	4	8-10
Expect to stay 'as is'	6	-
Expect to retrench staff	1	2
Unsure	1	-

Mentoring Support

Most of the mentorees rated their mentoring support very highly in most regards. It is evident from this table that the mentors established good rapport with their mentees, provided them with useful advice and support, and were generally well matched.

	Not very good	OK	Terrific	Other
How useful was the advice and support that you received from your mentor?	0	6	6	0
How accurate was the advice that you received from your mentor?	0	7	5	0
How satisfied were you with the mentoring support you received through this 6-month program?	0	5	7	0
How well-matched to your needs was the mentor you were allocated?	1	4	7	0
How useful did you find the Management Development Briefings for learning new management skills?	0	4	7	1*
How useful did you find the Management Development Briefings for networking with your colleagues?	0	5	6	1*

**Unable to attend on Tuesdays.*

Additional Comments

The mentorees were invited to comment on the program and how it might have been improved or made more effective. The following is a representative selection of these comments.

Thanks

- *I would like to express my sincere thanks to all concerned in conducting the program.*
- *Thank you for a job well done.*

The Program as a Whole

- *The system worked extremely well overall as it was set up.*
- *I would recommend this type of mentoring program as one of the best programs I have seen for enhancing enthusiasm and bringing competitors together to become allies through active networking and awareness of one another's strengths.*

Program Benefits

- *The benefits we will gain from the assistance provided by our mentor in assisting to develop a costing program will be of major importance once completely finished.*
- *It is helpful to get a bit of moral support and see how others operate.*
- *I found the program to be very informative and in many circumstances re-affirmative in that it was good to hear someone that knows to confirm what you may have been thinking, I also gleaned a lot of information from my peers and their experiences. Thank you for the opportunity.*

The Selection and Matching of the Mentors

- *Mentors seemed to be fairly well matched but some needs changed as the season progressed, meaning the importance in particular areas shifted in some cases.*

Management Development Briefings

- *The Management Development Briefings were very important.*
- *The Tuesday night of networking and briefing was extremely valuable to the whole program but they were sometimes a little disappointing for lack of participation by some mentorees and perhaps some mentors.*
- *Unfortunately I found it difficult to attend the Tuesday evening sessions at 6.00pm. Perhaps some early morning sessions could be considered.*

Some Suggestions

- *A more frequent contact with the mentor would be desirable, especially in the beginning.*
- *Hold some job costing workshops.*
- *Visits to other businesses would broaden understanding.*
- *Create a position of job-chaser/coordinator. Someone that can chase work (for all local industries) from near and far, including government contracts. Perhaps to coordinate if more than one firm is involved.*
- *Perhaps a review by a second mentor (would be useful).*

A Suggestion for Providing Capital for New Inventions

- *We should have a prize of at least \$10,000 – with a committee judging the inventions, concepts, or processes – say at an inventors' section at the Albany Trade Fair or Albany Show. Committees should be of businessmen, farmers and engineers with letters behind their names (not real estate agents or car salesmen!) but people with track records. Secondly, a system to generate seed and venture capital could be established. Some kind of fund where local investors put in (risk) say a max of 10% - place a cap of \$20K to*

spread the risk and participation. The return could be huge. The above committee could administer the fund and the aim should be to create new industries that produce world class products at competitive prices.

To succeed, every venture has to be well-managed, well-resourced and well-commercialised. That rules out most inventors.

16 ISSUES THAT EMERGED FROM THE PROGRAM

The following are some of the issues that emerged during the implementation of the program, and which may be of use when structuring future programs of this type. (It must be recognised that these are generalised observations and do not necessarily apply to all of the 12 mentor/mentoree situations.)

- It was found that the initial (assessment and planning) stages of the program generally took longer than anticipated. Thus, in order to expedite these stages, the mentors typically spent more time and had more frequent meetings with their mentorees than had been planned.
- The initial assessments typically uncovered a wide range of 'internal' issues that needed to be addressed (such as costing systems, product improvements, financial issues) before the mentoree was able to start on 'external' activities (such as marketing and promotion). Most mentorees found that this assessment stage uncovered a wider range of issues than they had initially expected. In this context, several mentorees commented that they found the participation of the mentor encouraged them to take a much wider and longer-term view of things than they would normally do
- Those mentorees whose businesses were strongly dependent on the agricultural sector experienced very tough market conditions for most of the 6-month program, although this suddenly improved significantly in the final weeks of the program. For these mentorees, the focus was on business survival and while the mentors were able to assist them in this regard, this limited their ability to implement any growth-related activities.
- It was found that fewer-than-expected of the mentorees required or were suitable for obtaining investment funding to stimulate the expansion of their businesses or to underwrite the development of new products and inventions. Typically, the mentorees were found to have adequate business funding from traditional sources (ie. the banks) or to have inventions that were not yet ready for commercialisation. Only one was in a situation where a significant amount of funding was required to underwrite the development of new products and technology – and assistance in seeking this funding was provided by the mentor.
- The Management Development Briefings provided a valuable opportunity for the mentorees to learn additional management skills. In addition they provided an excellent and regular opportunity for networking within the group. The participants particularly appreciated this activity and the format of the later sessions was thus adapted to provide extra time for networking. They also provided a regular stimulus for the momentum of the program and an opportunity for the GSDC and the Lead Mentor to meet regularly with the mentorees.

17 PROBLEMS AND SOLUTIONS

The following are some of the more common problems that were encountered and the solutions that were initiated:

Problem	Situation	Solutions/Initiatives
A lack of customers and sales.	A very common problem largely due to adverse seasonal conditions in the agricultural sector for most of the program (it improved suddenly at the end of the program period).	<ul style="list-style-type: none"> Expand their market focus to a wider geographic area, including export Develop products, services and marketing initiatives to open up opportunities in the non-agricultural sectors.
Difficulties in identifying and marketing to new customers.	Most of the mentorees have well developed skills and experience in engineering but generally lack skills and experience in marketing.	<ul style="list-style-type: none"> Plan and implement more effective marketing strategies and activities – such as better marketing/advertising materials, better presentation of tenders and quotes, better sales letters, developing a formal plan for marketing activities, etc. Consider third-party marketing arrangements – such as the use of agents – if mentoree lacks skills and interest.
Cash flow difficulties:	Some mentorees experienced a significant downturn in income in the early and middle stages of the program, notably those who were dependent on the agricultural sector for their income.	<ul style="list-style-type: none"> Assist with management decisions to cope with the downturn – prudent cash management, staffing adjustments, seeking new customers, and so on.
Staffing and organisational structure issues:	Many of the mentorees had quite informal organisational structures.	<ul style="list-style-type: none"> Assist in formalising these structures, define roles and responsibilities, assess the skills and experience required, plan and instigate training and staff development programs.
Governance issues	Some mentorees had issues that needed attention in such things as management structures, shareholdings, directorships, succession, etc.	<ul style="list-style-type: none"> Explain the importance of these often-ignored issues. Provide guidance as to how these issues could be addressed.
Commercialising and expediting new product development.	Several mentorees had a strong focus towards R&D and new product development. However, they typically lacked the skills and knowledge to progress their new inventions much beyond the concept or prototype stage.	<ul style="list-style-type: none"> Recommend and guide implementation of next steps in product development and commercialisation processes. Note – fewer than expected had products that were investor ready.

18 NEXT STEPS

The GSDC could play a role in continuing to build on the momentum that has developed within this engineering 'cluster'. There could be significant benefits to the participants in terms of expanding their market opportunities, developing networking and sub-contracting between the group, possibly winning some larger tenders as joint venturers, and continuing their learning from their peers and group activities.

Note that the mentorees do not expect the government to continue to subsidise or pay for their ongoing mentoring requirements. Four of the 12 mentorees have already made arrangements to continue with their mentors' services at their own expense and another four say that they may do so.

The cost to the GSDC would thus be quite modest, and could be applied to:

- Setting up a calendar of regular networking events for the group – with visiting speakers on key topics, factory tours, and so on. (Say, 5-6 events a year.) Note that all of the mentorees have indicated they would be willing to contribute an average of more than \$200 each towards the costs of these sessions. (A total of \$2,900 has been promised.)
- Sending out a newsletter – covering topical issues, management tips, upcoming contracts, regional issues affecting their industry sectors, and so on.
- Supporting the services of a 'job chaser' who would seek contract work and orders from a wider geographic area than they presently cover, and who would develop teams to pitch for larger contracts than they could attempt as individual businesses.

ATTACHMENTS

Attachment 1

MENTORS COVERING LETTER

Dear xxxxxx

Thank you for your expression of interest in joining our Panel of Mentors.

We would like to gain an understanding of the skills and experience that you can contribute to our team, so that we can match this with the needs of the various Mentorees. In an endeavour to simplify this task we have prepared a questionnaire (attached), which is very similar to one we will be sending to the Mentorees (who will be using it to define their needs). We have also included some information about the program.

Please complete the questionnaire and add any comments or attachments you believe would be useful. As a minimum, please include your resume and a brief overview of your consulting practice – including how long you have been consulting, nature of the consulting work you have undertaken and your employment prior to working as a consultant.

Importantly, please provide evidence to support the competencies you are claiming – such as information about recent projects that you have undertaken and the industries and fields in which you have particular experience. Some space is provided on the questionnaire for this purpose.

We look forward to hearing from you as soon as possible. Please make sure you have returned this questionnaire and supporting material before Wednesday 16th May, as we will be meeting on that day to select the most appropriate mentors for the participating organisations. (Use fax or e-mail if this is speedier and more convenient)

A Mentors Briefing Workshop and Mentor/Mentoree Introductory Workshop are planned to be held in Albany in the early part of the week commencing 20th May and it will be mandatory for the selected Mentors to attend these workshops. The objectives of the Workshops will be to establish some principles and procedures for the Mentoring process – so both parties have a clear understanding of what is being delivered, and secondly to introduce the Mentors to their Mentorees. These will probably be 2-3 hour evening sessions on Monday 21st and Tuesday 22nd May, but this is still to be confirmed.

Please do not hesitate to contact me or Mark Jessop at The Boshe Group on (08) 9486 4011 or Sally Haigh or Maynard Rye at the GSDC on (08) 9842 4888 if you would have any queries.

Sincerely,

Richard Webster
Lead Mentor
GSDC Mentoring Project
The Boshe Group

QUESTIONNAIRE FOR MENTORS

Please work through this checklist and tick (✓) those areas in which you believe you can provide assistance through the mentoring program. You can tick as many as are appropriate. Please also indicate with double ticks (✓✓) and treble ticks (✓✓✓) those areas that you consider you have a high level of skills and experience to offer.

- ✓ = good skills and experience in this area
- ✓✓ = well skilled and well experienced
- ✓✓✓ = advanced skills and experience / expert in this area

INTERNAL ISSUES

Management

- Organisational structure – definition of duties and responsibilities
 - Management style and comfort with CEO role
 - Management information systems
 - Application of strategic / business planning initiatives
 - Establishing company goals and objectives
 - Business planning
 - Any other management competencies? *(please write in)*
-

Marketing

- Products and services - stage in life cycle/competitive advantages/disadvantages
 - Pricing policies – how much can we / should we charge?
 - Promotion and advertising – how, when, where, how much?
 - Market positioning – image in the market
 - Marketing strategies – new business / repeat business / new markets?
 - Market information – segments / target markets / growth areas/special needs
 - Competitors and competitive information – strengths / weaknesses / market positioning / pricing
 - Customers and potential customers – understanding / finding any changes / trends / special needs
 - Selling – not getting enough sales / orders
 - Any other marketing competencies? *(please write in)*
-

Operations

- Operational procedures and processes - can they be improved?
 - Equipment – anything missing? What costs are involved?
 - Stock control – imbalance of stocks vs. outputs
 - Production planning and control systems
 - Information systems
 - Purchasing systems, relationships with suppliers
 - Deliveries to/from suppliers
 - Constraints and limitations with operations
 - Quality control systems
 - Performance measures
 - Any other operational competencies? *(please write in)*
-

Staff

- Organisational culture – employee morale and motivation
 - Communication / information / consultative process
 - Industrial relations / unions / legislation / employment laws
 - Training and development
 - Reward and incentive systems
 - Performance measures and appraisal systems
 - OH&S management
 - Any other staff management competencies? *(please write in)*
-

Innovation and New Business Development

- Inventing and generating new ideas
 - Developing new products
 - Testing new ideas – estimating market potential / analysis
 - Commercialising new inventions / new products
 - Any other innovation competencies? *(please write in)*
-

Finance

- Accounting procedures and systems
 - Financial management and planning
 - Tax issues / GST
 - Superannuation
 - Cash flow position – now and projected
 - Funding requirements – operating capital / capital for equipment, etc
 - Costing systems and cost control
 - Budgets and forecasts – meeting profit targets
 - Any other financial competencies? *(please write in)*
-

EXTERNAL ISSUES

- Low barriers to entry / too easy for new competitors to establish
 - Strength of suppliers – can the ‘control’ you
 - Statutory requirements / changes – and impact on costs
 - Business environment – does this affect your business?
 - Market fluctuations / cycles
 - Too dependant on one client or one market segment
 - Supply chain relationships
 - Any other external competencies? *(please write in)*
-

ANY OTHER COMPETENCIES? (Please write in)

EVIDENCE OF CLAIMED SKILLS AND COMPETENCIES

Please provide information about your recent projects or activities that provide evidence of the skills and competencies you are claiming.

(If necessary, please attach additional sheets.)

INFORMATION ABOUT THE GSDC MENTORING PROGRAM

Background

‘Mentoring for light industry owner/managers in the Great Southern’ - a project to build on the capacity and market share of the region’s Manufacturing and Light Engineering Industry.

This project is funded and supported by the Great Southern Development Commission and the Federal Government through its Small Business Enterprise Culture Program (SBECP). The SBECP is an initiative of the Federal Government which aims to foster growth of small businesses by improving the capacity of small business owner/managers to access skills development and mentoring services which meet their needs. A specific focus of the SBECP is on the development of women small business managers.

Mentors Wanted

Mentors are wanted to add to a team of mentors for this project. Those with skills and experience in the following areas are being sought:

- Business management and development
- General and light engineering
- Equipment manufacturing - for the agricultural, viticultural, marine, timber and transport industries

Tasks will include:

- Review of day-to-day operations
- Providing guidance on options for improvement
- Advise on cooperative opportunities, and where appropriate
- Assist with getting new products and inventions into the marketplace

Operational Details

There are 12 mentorees who have nominated for the program. Mentorees will be matched with mentors according to the needs of the mentorees and the skills and experience that mentors have to offer. A small committee will be responsible for this selection and matching process.

It is quite probable that some of the mentors who have been selected for the team may not be matched with mentorees, as there may not be any who require their particular skills and experience. Mentors may be matched to more than one mentoree.

This is a 6-month project commencing 21 May. It will commence with induction workshops (of about 3 hours duration) to ensure that both mentors and mentorees have realistic expectations and an understanding of their obligations. This will involve separate sessions for mentors and mentorees, and joint session. All participants will be required to complete this induction prior to commencing the program. At this stage the mentors’ sessions are scheduled for Tuesday 22nd in Albany (more details to be provided later).

Mentors will be required to conduct 6 meetings with their mentoree(s) over the duration of the program – at roughly monthly intervals. The fee per mentoree of \$3,542 (including GST) is

based on a notional 46 hours of consulting time at an hourly rate of \$77 (including GST). This includes induction time, reporting time, analysis time, meeting-with-the-mentoree time, etc..

A pool of money (\$4,800 including GST) has been set aside to contribute towards the travel costs, essentially for non-Albany based mentors. Once the tasks have been set and agreed then these funds will be allocated. It is possible they may not cover all of your travel costs.

In this context note that 7 mentorees are in Albany, 1 in Torbay, 1 in King River, 1 in Katanning and 2 in Kojonup.

There are 3 stages in the mentoring service that is envisaged:

- Stage 1: Assessment and situation analysis
- Stage 2: Identifying and reviewing options for improvement
- Stage 3: Guidance during implementation

It is expected that each of these stages will have roughly equal duration. However, it may be possible to advance more quickly through to Stage 3 with the better-prepared mentorees.

Contact reports will be required after each contact – listing the events that have occurred since the last meeting, new issues that were reviewed, tasks that were agreed on for the mentoree to complete, and tasks for the mentor to complete before the next meeting(s). These will be consolidated into a monthly report to the client.

If you are selected as a mentor you will be offered the role before being introduced to the mentoree. Once you have undertaken to take on the role of mentor for a designated mentoree, and have met with that mentoree, we expect that you would complete the 6-month assignment with that mentoree. If for some reason it becomes a mis-match for reasons of the skills set that is required or for personality reasons, then a re-match will be arranged and a pro-rata fee negotiated.

The Lead Mentor will assist where required with additional advice and will have a reporting and supervisory role.

Payments will be made by The Boshe Group on a two-monthly cycle. Thus, there would be one payment at the end of month 1, month 3, month 5 and month 7, subject to the submission of satisfactory reports.

Insurance

All mentors (consultants) are required to provide their own workers compensation insurance, public liability insurance and professional indemnity insurance for the duration of the program, and show evidence that this insurance is in place, or provide acceptable disclaimers to absolve The Boshe Group and GSDC of any responsibility in these matters.

QUESTIONNAIRE FOR MENTOREES

Please work through this checklist and tick (✓) those areas in which you believe you need assistance through the mentoring program. You can tick as many as are relevant to you and your business. Please also indicate with double ticks (✓✓) and treble ticks (✓✓✓) those areas that you consider to be of greatest importance.

- ✓ = important
- ✓✓ = very important for growth
- ✓✓✓ = essential or critical to my business survival or growth

INTERNAL ISSUES

Management

- Organisational structure – definition of duties and responsibilities
 - Management style and comfort with CEO role
 - Management information systems
 - Application of strategic / business planning initiatives
 - Establishing company goals and objectives
 - Business planning
 - Any other management issues? (*please write in*)
-

Marketing

- Products and services - stage in life cycle/competitive advantages/disadvantages
 - Pricing policies – how much can we / should we charge?
 - Promotion and advertising – how, when, where, how much?
 - Market positioning – image in the market
 - Marketing strategies – new business / repeat business / new markets?
 - Market information – segments / target markets / growth areas/special needs
 - Competitors and competitive information – strengths / weaknesses / market positioning / pricing
 - Customers and potential customers – understanding / finding any changes / trends / special needs
 - Selling – not getting enough sales / orders
 - Any other marketing issues? (*please write in*)
-

Operations

- Operational procedures and processes - can they be improved?
 - Equipment – anything missing? What costs are involved?
 - Stock control – imbalance of stocks vs. outputs
 - Production planning and control systems
 - Information systems
 - Purchasing systems, relationships with suppliers
 - Deliveries to/from suppliers
 - Constraints and limitations with operations
 - Quality control systems
 - Performance measures
 - Any other operational issues? (*please write in*)
-

Staff

- Organisational culture – employee morale and motivation
 - Communication / information / consultative process
 - Industrial relations / unions / legislation / employment laws
 - Training and development
 - Reward and incentive systems
 - Performance measures and appraisal systems
 - Discipline / managing staff
 - OH&S management
 - Any other staff management issues? *(please write in)*
-

Innovation and New Business Development

- Inventing and generating new ideas
 - Developing new products
 - Testing new ideas – estimating market potential / analysis
 - Commercialising new inventions / new products
 - Any other innovation issues? *(please write in)*
-

Finance

- Accounting procedures and systems
 - Financial management and planning
 - Tax issues / GST
 - Superannuation
 - Cash flow position – now and projected
 - Funding requirements – operating capital / capital for equipment, etc
 - Costing systems and cost control
 - Budgets and forecasts – meeting profit targets
 - Any other financial issues? *(please write in)*
-

EXTERNAL ISSUES

- Low barriers to entry / too easy for new competitors to establish
 - Strength of suppliers – can they ‘control’ you
 - Statutory requirements / changes – and impact on costs
 - Business environment – does this affect your business?
 - Market fluctuations / cycles
 - Too dependant on one client or one market segment
 - Supply chain relationships
 - Any other external issues? *(please write in)*
-

ANY OTHER ISSUES? *(Please write in)*

CONTACT REPORT – LIGHT INDUSTRY MENTORING PROJECT

MENTOREE _____ ----- Meeting No: _____

MENTOR _____ Date _____

CONTACT INFO. (In-person, by phone, place) _____

APPROX. DURATION _____

EVENTS SINCE LAST MEETING

ISSUES DISCUSSED/REVIEWED AT THIS MEETING AND DECISIONS MADE

MENTOREE 'TO DO' LIST

MENTOR 'TO DO' LIST

NEXT MEETING (Date, Time, Place)

PROGRAM COMPLETION QUESTIONNAIRE FOR MENTOREES

Please complete and return this questionnaire as soon as possible. The results will be tabulated and presented as tables in our report – and you will not be identified. Any comments that you add will also be rendered anonymous if they are used in the report.

KEY PERFORMANCE MEASURES

No. of employees in your business -	At the beginning of the program? (end of May)	At the end of the program? (end of Nov)
Full-time <i>(including yourself)</i>		
Part-time		
Sub-contractors <i>(if relevant)</i>		

Any comments/explanation?

Compared to your situation at the start of the program (end-May) has your sales turnover -	<i>Tick one box only</i>	If so, by how much? (%age)
• Increased		
• Stayed the same		
• Decreased		

Any comments/explanation?

FUTURE CONFIDENCE *(Tick one box per line)*

Compared to how you were at the beginning of the program in May/June, how confident are you now about:	Less confident	Same as before	More confident
• The overall future for your business			
• The future profitability of your business			
• The ability of your business to withstand market fluctuations			
• The competitive strength of your business			
• The financial strength of your business			

PERSONAL CAPABILITIES and SKILLS *(Tick one box per line)*

Compared to how you were at the beginning of the program, how do you now rate your personal capabilities and skills for:	Weaker/ Not as Good	Same as before	Stronger/ Better
• Making the right decisions about your business			
• Planning for the future of your business			
• Handling the day-to-day issues in your business			
• Handling staffing matters like selection, training and development			
• Managing your time effectively			
• Handling the marketing aspects of your business			
• Handling the financial aspects of your business			
• Handling the operational aspects of your business			
• Handling the cost control aspects of your business			
• Handling the ownership/governance/legal aspects of your business			

BUSINESS MANAGEMENT PERSPECTIVE (*Tick one box per line*)

Compared to the beginning of the program, would you now say that you:	Not as good	Same as before	Better
• Have a clear vision of the future for your business			
• Have a well-defined 'to do' list (action list)			
• Have a well-developed network of contacts in light engineering and manufacturing in your region			
• Have a good understanding of how to develop and commercialise new products and inventions			

BUSINESS OUTLOOK

In the next 12 months do you.....?	<i>Tick one box only</i>	If so, by how much? (%age)
• Expect to expand your business		
• Expect to stay 'as is'		
• Expect to contract		

Any comments/explanation?

STAFFING NEEDS

In the next 12 months do you.....?	<i>Tick one box only</i>	If so, how many?
• Expect to hire additional staff		
• Expect to stay 'as is'		
• Expect to retrench staff		

Any comments/explanation?

YOUR MENTORING SUPPORT (*Tick one box per line*)

	Not very good	OK	Terrific
• How useful was the advice and support that you received from your mentor?			
• How accurate was the advice that you received from your mentor?			
• How satisfied were you with the mentoring support you received through this 6-month program?			
• How well-matched to your needs was the mentor you were allocated?			
• How useful did you find the Management Development Briefings (Tuesday night sessions) for learning new management skills?			
• How useful did you find the Management Development Briefings (Tuesday night sessions) for networking with your colleagues?			

Any comments/explanation?

ADDITIONAL COMMENTS

Recognising that this was a pilot program and may be used as a model for similar programs in other places, do you have any comments and suggestions as to how the program could have been made more effective, improved, or run better? For example, with regard to:

- The role of the Mentors
- The selection and matching of the Mentors
- The frequency of contact
- The duration of the program
- The Management Development Briefings (Tuesday sessions)
- The opportunities for networking

Please record your comments below

THANK YOU FOR YOUR PROMPT RESPONSE.

Please fax this back to Richard Webster on 9486 4010.

Please write your name and company below so we know who we have to follow up.

Name _____ Company _____ Date _____

GSDC QUESTIONNAIRE REGARDING PROGRAM CONTINUATION

STAGE 2: GSDC SUPPORT FOR DEVELOPMENT OF THE LIGHT INDUSTRY NETWORK IN THE REGION

Please complete this questionnaire and mail or fax it back to Sally Haigh at the GSDC,
110 Serpentine Road, Albany, WA 6330 or fax 9842 4828.

Do you wish to continue with this program?

Yes

No

If not, please state why

In which elements of the continuing program are you interested in participating?

Networking meetings/get-togethers (with no guest speaker)

Management Development Briefings (with a guest speaker)

Receiving the Newsletter

Using the services of a network "job seeker"

Other (please explain)

Would you prefer to have –

Just a get-together for networking opportunities and to keep communication going amongst
the group

OR

Management Development Briefings (like those we held in 2001) where there is a guest
speaker on a relevant topic plus a briefer opportunity for networking

Are you interested in having meetings based around a "factory tour" of one of the group's
facilities?

Yes

No

Would you be prepared to hold such a meeting at your premises?

Yes

No

What days/times are best for you to attend Management Development Briefings?

What topics would like to see covered? (use space at the bottom of the page if needed)

Would you like to bring other staff/representatives with you?

Yes

No

(If yes: How many?)

Would you be prepared to make a financial contribution to the program? (We are not asking you for a firm commitment, we are simply testing the idea.)

Yes

No

How much (circle one)? (\$100, \$200, \$500, \$1000 for the year)

Will you be continuing to work with your mentor (at your own expense, during 2002)?

Yes

No

Any other comments?

Name:

Company:.....

Date:

Signature: