

## IMPLEMENTATION OF AN OPERATIONAL EXCELLENCE MANAGEMENT SYSTEM MODEL IN AN INSURANCE COMPANY

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**Abstract:** *This research aims to present the implementation of a Model of Management System that drives Operational Excellence in an organization from the insurance sector. The novelty of the model is represented by the concise view over the organization, namely from five perspectives, respectively: the customer, process efficiency, team performance, skills and organization, mindset and behavior, as well as the proper instruments, implemented to support all these perspectives and which, brought together in the daily work of the middle managers drive the operational excellence. Also, the model brings a unique combination of tools used to form the management system, as well as necessary status monitoring and reporting tools, in order to ensure proper follow-up on the status, progress and results. The implementation of the Management System Model for Operational Excellence is conducted as a change management project, organized in several stages, starting with the diagnosis phase, in which an Analysis of the as-is situation of the departments in scope from the organization is done, then continue with the Design phase, in which the identification of opportunities of improvement following Lean principles is done, as well as designing the future desired system, Planning, Implementation, Follow-up/ maintenance. The benefits resulted from the pilot implementation of the Management System Model for Operational Excellence determined the management of the organization to extend the implementation to the entire organization.*

**Keywords:** *operational excellence, management system, efficiency, continuous improvement, customer focus.*

### INTRODUCTION

In recent years the financial sector and specifically the insurance companies have been facing challenges regarding high expectations from clients in a fast-moving digital world, with respect to the quality of services, flexibility and availability of the interactions, communication, support and assistance, while recording pressure on costs and profitability of products and lines of business. This led to preoccupations from top management towards business transformation through digitalization, optimization of processes and operational excellence, with main focus on customer needs and expectations.

This paper is part of a larger study, that analyzes the implementation of a Management System Model for Operational Excellence in companies from financial services industry. The novelty of the model lies in the concise view over the organization and the business, namely from five perspectives, as through five lenses, namely: the customer, process efficiency, team performance, skills and organization, mindset and behavior, as well as the proper instruments, chosen specifically to support all these perspectives and which, brought together in the daily work of the middle managers, drive the operational excellence. The model brings together principles, concepts and tools from several methodologies, such as Lean and TQM (Total Quality Management) and it also introduces new tools for the usage of management team in order to set up, implement and successfully maintain this management system. This way, the Management System Model for Operational Excellence has proper prerequisites and necessary tools to ensure its sustainability and continuity over time.

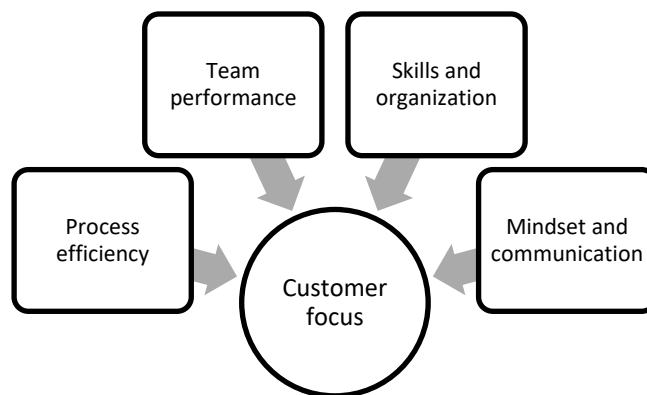
Operational Excellence refers to a set of principles and practices that foster the continuous improvement of an organization [1]. Operational Excellence is an approach to management of organizations by which the focus lies on continuous improvement across all aspects of the business, as a permanent practice in managing operations in order to achieve the desired goals and targets, while pursuing a strategic competitive advantage, ensuring the provision of high-quality products and services that meet customer needs and expectations. This involves the fact that given the proper facilitation and leadership approach from the management team, all employees are aware of the importance of the clients, know their needs and expectations and, by their work in the organization, provide the expected deliverables, outputs, results. In order to achieve and maintain operational excellence, naturally, organizations pass successively through a series of stages, namely: process effectiveness, process efficiency, continuous improvement, operational excellence. According to Carvalho [2], strategies are formed as new values espoused by the leadership and settle as a

routine once they are perceived as successful ways of dealing with problems. In the Effectiveness stage, the focus is on effectiveness at activity level and at process level, in Efficiency stage, the focus is on activity and process efficiency, in Continuous improvement stage, the areas extend from processes, to people and employees, as well as products and services, while in Operational excellence, the target is to cover the entire organization.

Implementation of operational excellence involves the existence of an effective management system, having as prerequisites the buy-in and commitment of top management and the permanent support and involvement of management at all levels, as well as dedication of leaders and staff from the entire organization. Management must declare its commitment towards quality, namely the organization must deliberately deliver products and services without defects [3].

The Management System Model for Operational Excellence provides principles, tools, and methods in order to drive the organization towards operational excellence and to ensure its sustainability after the implementation. This management system offers favorable setup for managing change inside the organization and specifically inside each department and team. It ensures a proper context for continuous improvement initiatives, initiated by middle management, team members and involved stakeholders.

The model places the customer in its center of focus, while ensuring effective and efficient operations under the following 4 other focus points: process efficiency, team performance, skills and organization, mindset and communication. The voice of the customer remains in the center of attention for both management and staff, in order to permanently collect and effectively respond to needs and expectations. This is shown in Figure 1 below. The entire management system is designed such that the operations to be managed, executed and maintained following on a permanent basis these 5 perspectives. Each of these 5 perspectives of the Management System Model for Operational Excellence brings approaches and principles to be followed and ensure for the organization a common, standardized approach at all levels of the organization. Moreover, the tools and methods of the management system model are covering at least one of these perspectives, forming an overall performant management system that drive the organization from effectiveness to operational excellence in a sustainable way.



**Figure 1:** The 5 perspectives of the Management System Model for Operational Excellence

The Customer focus perspective brings the approach that all activities that generate no value for the customer shall be eliminated or minimized, where it is possible to do so. Also, the work capacities and the corresponding allocation of resources are adapted and flexibly adjusted to the fluctuations in demand. According to Bruhn [4], the customer orientation is a solid scientific guarantee for the success of an organization and its existence on the market. The clients are considered in this model both from an external perspective, as final customers that buy the products and services, as well as from the internal perspective, considering that in a process-based organization, with departments and teams that are in a permanent interaction, they play successively the role of internal clients and internal suppliers (of data, information, documents etc.). The main tools of the Management System model covering the customer perspective are the customer satisfaction surveys, as well as regular meetings, set up in a standardized manner for inside the teams and between cooperating teams. Inside the teams, there are considered short daily meetings that usually take place besides a physical or electronic whiteboard, weekly meetings and meetings between interfacing teams. Standardization is an important asset when setting up the meeting frequency, structure and approach [5] Standardized agenda, meeting sections and agenda points are important points to be considered for both team meetings, both daily and weekly, as well as for the meetings with the interacting departments. Among the principles and rules for the meetings, there are the following: the daily meetings are to be held at the beginning of the day, they take no more than 15 minutes and the focus is on priorities of the day, capacity allocation and task allocation, as well as identification of bottlenecks or issues. Moreover, for the weekly team meetings, the agenda is to be prepared and communicated in advance, it is recommended to have a standard structure and to be followed by the team during the discussions. The discussions should address topics with immediate application, achievements, problems and incidents, evolution of KPIs (key performance indicators) and corresponding measures to be implemented. Additionally, information from the team meeting is recommended to be structured and split into short-, medium-, and long-term topics.

The Process efficiency perspective brings processes under focus. All processes shall be strictly oriented to meet

customer needs. Also, Lean principles apply when making the process analysis and optimization, for example in order to eliminate the 8 types of wastes according to Lean methodology (Defects, Over-production, Waiting time, Transport, Inventory, Movement, Over processing, Under-usage of the human resource). In addition, process observations are to be performed on a regular basis. Moreover, Standard Operating Procedures for important process steps are to be implemented in order to allow best practice sharing and the exchange of skills at all levels. They bring clarity to roles and responsibilities, facilitate the introduction of new team members and activities. The cross-functional processes are to be accompanied by SLAs (service level agreements) among teams, in order to enhance responsibility and accountability, as well as to avoid waiting time and issues regarding capacity management. The cross-team meetings, which can be called interface meetings and are to be held regularly, can have as main focus points: bottleneck, issues and problems, service level agreements (SLAs) between the teams on the operating processes, as well as qualitative expectations and KPIs to be set up, monitored and discussed on regularly. In terms of allocation of resources, capacity management analysis and tools implementation are important aids to manager's activity, facilitating proper allocation of resources and talents. In addition, the process observation is a valuable tool of the management system model. This enables team members to be open to offer and receive feedback, to be open to opportunities of improvements, as well as to share best practices and identify quick wins for process efficiency.

The Team performance perspective brings to focus the transparent performance management, which shall be used for team management, as well as for the development of skills. Performance management is an ongoing process that involves employee assessment, feedback, and coaching for development [6]. The involvement of the manager in team management is done on a daily basis and whenever necessary. This is implemented according to the belief that the secret of the success lies in the daily agenda [7]. Moreover, in order to ensure optimum team performance, the responsibilities are clearly set for individual goals, which are in alignment with the goals of the organization. Performance is to be set up and tracked by means of KPIs (Key Performance Indicators) that are clearly correlated to the objectives of the team and the objectives of the organization.

The Skills and organization perspective brings the concept of managers being coaches for the team members. The managers understand their roles as coaches and developers of talent and skills. According to Whitmore [8], managers must have the skills and experience to know how to help, instead of punishing. Also, employees are to be assigned tasks based on their level of competency, development areas, considering also the needed work capacity. Moreover, managers must clearly define the responsibilities of each team member, as the doubling of responsibility can lead to conflicts or activities not performed [3]. Discussions with team members regarding the individual performance are recommended to be organized in one-to-one meetings, which are to be held at least twice per year. Skills matrix is to be set up per team and per team member, by means of which the status of skills and abilities can be easily pictured, tracked, monitored. The skills matrix is to be regularly used, in order to ensure transparency, possibility to grow and develop competences and abilities, while ensuring good communication and support.

The Mindset and communication perspective brings the idea of open and transparent communication at all levels and on the processes. Also, the management team ensures a joint vision of short- and long-term goals. These principles are implemented by means of the structured meetings, mentioned above. According to Maxwell [7], in order to be able to successfully lead others, managers must have a proper mindset and positive attitude. They must firstly have the self-trust that during the journey with the team, they can protect and guide the team members. If they cannot make a successful journey in their mind first, they cannot succeed with the actual journey. Moreover, according to Duttagupta [9], consistency in communication is the key to leadership and success, so implementation of regular and standardized meetings and means of communication bring value and achievement of goals in a properly designed management system.

Another important tool for ensuring the continuous improvement, bringing together several of the above-mentioned perspectives is the introduction of structured problem-solving methods, tools and techniques, as standard approach. Employees, teams and leaders become open to identify problems, identify root causes by specific methods (such as 5 Why method, The Fishbone Diagram etc) and generate ideas for solving the issues, by eliminating the root causes that led to the appearance of the problem. In an operationally excellent organization, each team member can identify a normal or abnormal flow and know how to fix abnormality without assistance from the frontline or upper management [10]. Operational excellence should not be seen as an approach to promote change, but rather to provide tools and framing for people in the organization to deal with it [11]. Communication and cooperation are enhanced and developed, while focusing on process effectiveness, process efficiency and continuous improvement. Creative thinking, critical thinking, analytical thinking and techniques such as Brainstorming bring value to the process and offer possibility of growth and development for people [12]. According to Maxwell [7], the discipline of analytical thinking brings numerous benefits, such as: clarity and real perspective on things, ensuring emotional integrity, offers self-trust when taking decisions, clarification of the overview image, transforms a good experience into a valuable one.

## **EXPERIMENTAL**

Following the buy-in and acceptance from the management board of the company for the implementation of the

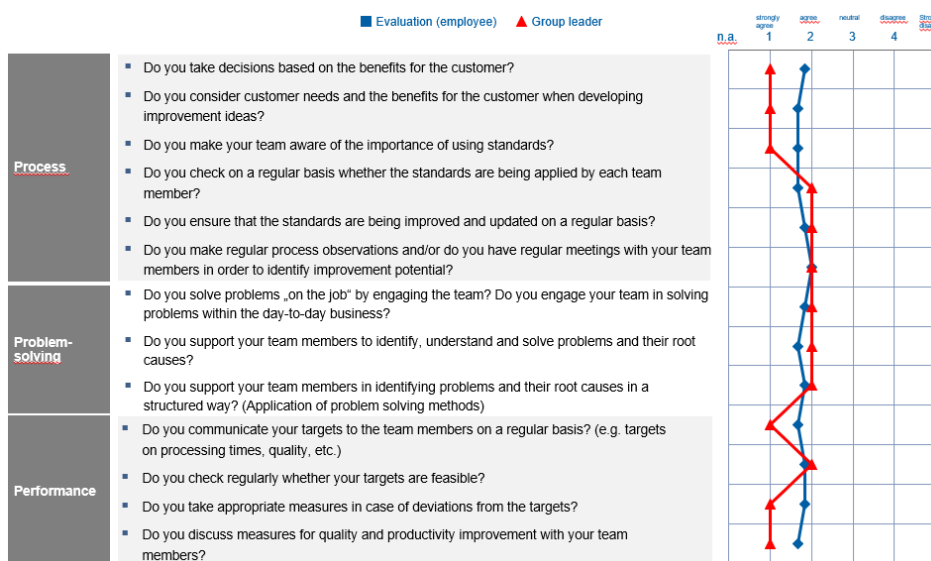
Management System Model for Operational Excellence, it was decided to start the implementation as a pilot project, with the target to achieve operational excellence in a big department of **an insurance** company, consisting of 10 teams, with different managers. This department has under their responsibility some of the main (core) processes of the organization. The implementation timeframe was set to 12 weeks for each team. A team of professionals was formed, having expertise and experience in the following areas of activity: management and leadership, project management, process management, process improvement. As Operational Excellence is a complex concept and it involves the change in the approach, mindset and practices of both management at all levels and staff from the entire company, this implementation is mainly a change management project, in which the organization transformation is the goal. This implementation is decided as a management system implementation, as it is known that in order to change the direction of the organization, the change of the leader is necessary [7]. This change can be produced at mindset level, approach level, systems and activities, not necessarily to change the persons that play the roles of leaders in the organization. In order to make the implementation in an effective manner, there should be considered the transition of the present system or state into the desired future state thereby maximizing the resources and minimizing cost at the same time [13]. Targeting the implementation of a proper and effective management system for operational excellence, the project is implemented with the support and advice of external consultants, having both management experience and the necessary expertise to guide such an implementation in the financial sector, insurance companies. As a best practice, during the implementation of the operational excellence project, internal consultants or coaches are being trained and formed, such that the maintenance and sustainability of the system to be ensured. According to James Clear [14], a commitment partner can make the difference when implementing a change. These internal coaches can be considered as commitment partners for the implementation project. Moreover, team coaching for performance is facilitated and can be implemented by using internal coaches [8].

## RESULTS

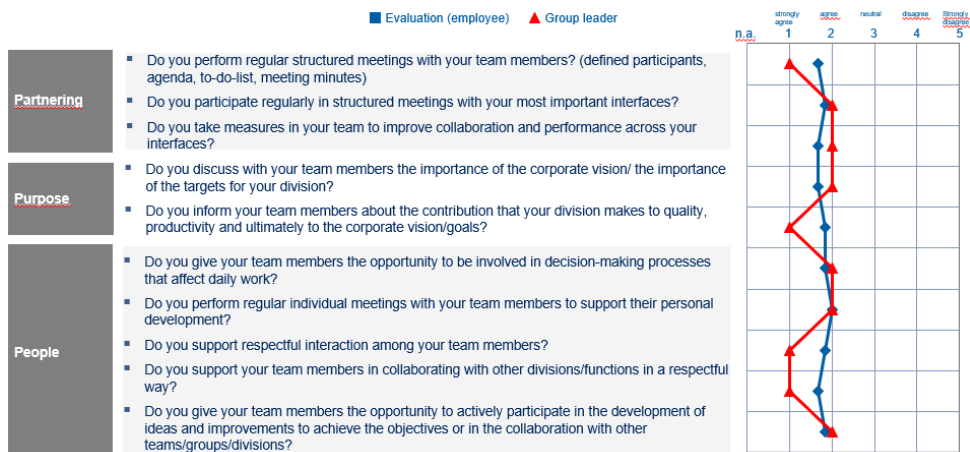
As other operating systems, a management system designed for operational excellence involves the execution of several phases, usually following the Deming cycle (PDCA – Plan-Do-Check-Act), following a preliminary diagnosis phase. In the Diagnosis phase the objective is to analyze the as-is situation and to understand the management style and tools which are used within each team. During this stage, among the methods and tools which are used are the following:

- For the Customer perspective: customer interviews and interviews with all interacting departments
- For the Process efficiency perspective: process observation, process analysis, analysis of activities
- For the Team performance perspective: meeting structure analysis, analysis of demand, analysis of key performance indicators (KPIs)
- For the Skills and organization perspective: analysis of the organization structure
- For the Mindset and communication: employee survey, management survey, workshop to clarify vision of the team and set up of future expectations

Also, there are identified opportunities of improvement following Lean principles, structured meetings concept is being considered, best practices, capacity management principles, division of labor and 4 eyes principle, skills matrix and then the design of the TO-BE system is done. For example, as a result of employee survey and management survey on topics related to the management areas and tools which are in scope of the Management System Model for Operational Excellence, several diagrams are drafted, to show aggregated results, as presented in the figures 2, 3 and 4.

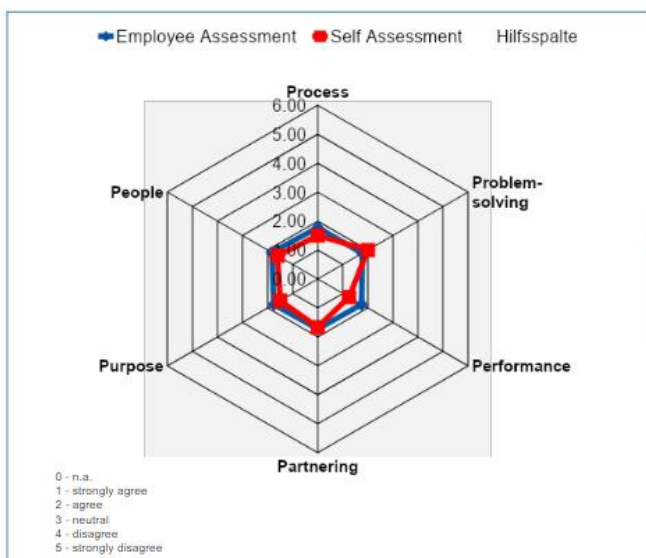


**Figure 2:** Diagram with 6P Survey aggregated results – Employees-Manager surveys (part 1)



**Figure 3:** Diagram with 6P Survey aggregated results – Employees-Manager surveys (part 2)

Figures 2 and 3 present aggregated results of the 6P survey results – Employee-Manager surveys. The 6P concept, aligned to fit this excellence model, refer to the following areas to be considered during these surveys: Process, Problem-solving, Performance, Partnering, Purpose, People. The results of the survey are aggregated in a radial diagram (Figure 4).



**Figure 4:** Radial diagram with Employees-Manager surveys – aggregated results

Some conclusions from analyzing this diagram are that manager and the team members have similar perception related to the 6P topics and management tools addressed. In this case, little changes are to be implemented under the Mindset and communication perspective for this team and manager. Similar analyses and diagrams were performed for all the 10 teams that were included in the scope of the implementation project.

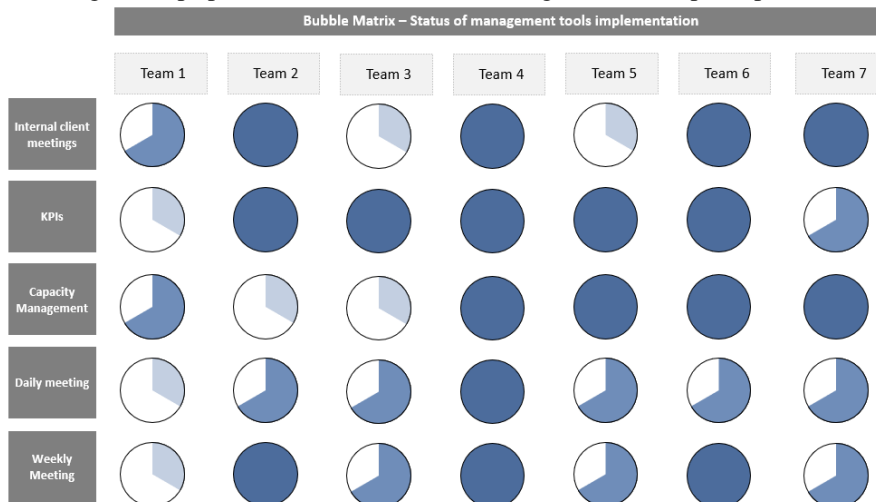
One of the deliverables of the Diagnosis phase is a list of findings for each team, which are to be associated with measures to be implemented for improving the as-is situation towards the desired state of the system. These are captured in an Implementation plan, which is one of the most important tools of the Management System Model. This tool, implemented in each team, offers to managers the possibility to follow, track and make follow-up on each of the measures and initiatives to be implemented, as well as to offer visibility in time over the work load of the team. Moreover, it offers the short-, mid- and long-term overview of the initiatives, tasks and objectives of the team, facilitating mid-term and long-term planning. By including in the implementation plan the responsible persons, deadlines and status for each action and deliverable, it facilitates awareness, responsibility and transparency within the team.

Besides the implementation by each of the 10 teams of the principles, rules and tools mentioned in the Presentation section, the model brings the necessary status monitoring and reporting tools, in order to ensure proper follow-up on the status, progress and results. Among the monitoring tools, there is the bubble monitoring tool. Each of the management tools that the teams are implementing was described in 4 steps and placed in a matrix as presented in below figure.

Management tool	Step 1 0%	Step 2 33%	Step 3 66%	Step 4 100%
<b>Internal client meetings</b>	no defined interfaces	interfaces have been defined	first interface meeting took place	next meetings have been scheduled; agenda and minutes are used
<b>KPIs</b>	no defined KPIs	KPIs have been defined	KPI tracking has been installed	KPIs are visible on the whiteboard and discussed during WB meeting
<b>Capacity management</b>	no defined capacity management	capacity management has been discussed with manager	baseline tool for capacity management has been designed	capacity management has been installed on an initial base
<b>Daily meeting</b>	no whiteboard meeting in place	Whiteboard has been designed	Whiteboard meeting takes place regularly	Whiteboard is used as a steering tool
<b>Weekly Team Meeting</b>	no weekly meeting in place	1st weekly meeting is planned	weekly meeting takes place regularly	employees are involved in weekly meeting. Agenda and minutes are in place and being used.
<b>Problem solving</b>	manager did not participate in workshop training	manager participated in workshop training	possible topics for a problem solving workshop have been defined	problem solving workshop with team has been planned
<b>Implementation plan</b>	no existing TIP	TIP has been discussed with manager and filled in with topics from the wave	TIP is filled in with due dates, responsible persons and actions are split into tasks	TIP is updated on a regular base, adapted and tasks have been implemented
<b>Meetings 1 to 1</b>	1:1s have not been addressed with manager	1:1s have been discussed with manager	1:1s have been scheduled for all employees	first 1:1 has been conducted
<b>Skill Matrix</b>	no existing skill matrix	skill matrix has been discussed	competencies have been defined and presented to employees. Each employee has a target	Self-evaluation of employees has been done
<b>Process observation</b>	manager did not participate in workshop training	manager participated in workshop training	process observation dates have been scheduled with employees	first process observation has been conducted and documented
<b>Standard Operating Procedures</b>	manager did not participate in workshop training	manager participated in workshop training	topics for SOPs have been agreed on	first SOP has been designed

**Figure 5:** Matrix presenting the steps of management tools implementation

The Bubble Matrix - reporting tool shows the status of implementation for each management tool in each team, following the steps presented in the matrix from Figure 5. A sample is presented below, in Figure 6.



**Figure 6:** (Extract of) Bubble Matrix – Status of management tools implementation

The implementation of the Management System for Operational Excellence brought significant qualitative and quantitative benefits for the organization. These were gathered, monitored and permanently reported to management. The benefits were measured independently by the project team, consultants and internal coaches' team and corroborated with the declared benefits by the involved managers of the involved departments, The method used in this case was the interview method as well as reporting and data gathering from applications and software systems.

As an overview of the benefits, the implementation offered the managers the basis for building a management culture, respectively the necessary tools for daily activity management, thus facilitating the transition from experts to managers. It brought permanent benefits to the activities and team relationship, clarity and increased responsibility for team members. In addition, the implementation plan described granularly the improvement action plan and facilitated tracking the implementation. The implementation of this management system offered structure in approaching problems and facilitated process analysis. Also, it was highly welcome by both management team and staff the structured problem identification, solution design and implementation monitoring. The implemented management system set the grounds for performance-based approach in all teams, in a standardized manner, through definition and monitoring of daily KPIs and SLAs. Also, implementation of daily team meetings following key improvement actions and KPI trends resulted in a better team management and employees' engagement. From process perspective, process observation highlighted redundancies to be replaced or eliminated and best practices to be shared, which resulted in streamlined and standardized processes. The regular meetings with the interacting departments and teams clarified the ownership and increased support and collaboration between all teams. Also, this implementation offered an increased transparency



over all end-to-end processes in scope. Capacity management was used to better support the business and have positive results, together with mitigation of volume peaks impact. Standard operating procedures standardized the processes and decreased the learning curve, facilitating also the knowledge transfer.

There were also recorded quantitative benefits, which were computed based on figures from the software systems and reporting tools that exist in the organization. The quantitative benefits were presented by managers of the teams as being important to their processes and overall performance. For example, one team reported a reduction with 1 FTE (full-time-employment), from 10 employees to 9, as a result of process improvement measures identified and implemented. In other team, the team cost was optimized with 45% on a process regarding the cooperation with external lawyers. In another team, 2000 EUR/ month were saved as a result of optimization of printing-related processes. Moreover, additional reduction of 20 working days/ year was reported. In other team, 0.05 FTE/ month was reduced, on some of their main processes and 0.03 FTEs was reduced in other reporting team, on some payment related processes. TimeToMoney KPI was reduced with 23%, resulting in more satisfied customers that needed to be refunded. In all teams, overall, an additional reduction of 1 FTE was recorded on reporting processes. Additionally, the errors rate was reduced in all teams with 15%, by the implementation of standardized documents and standard operating procedures for the team members.

## **DISCUSSION**

As a result of this implementation, the management of the company decided to extend the implementation of the Management System Model for Operational Excellence in the entire organization. These enlargements are recommended to be organized with the support of the internal coaches which were specifically trained, in order to keep the accuracy of the methods, approaches and tools. Moreover, according to James Clear [14], a commitment partner can make the difference when implementing a change, and in such case the internal coaches can be considered as commitment partners for the success of the implementation. Moreover, considering the continuity and self-sustainability of such an important and life-changing approach in the organization, the team of internal coaches might not be enough. It is possible that a background support and regular audits from the Group where the organization belongs are highly welcome. Together with the benefits brought by the implementation of the management system for operational excellence, there were resources that were allocated for the implementation of the project, such as the management team, there were new roles defined in the organization, namely the internal coaches. Also, for the daily operations of the business-as-usual, several activities were added on managers' agenda and in the team members' responsibility. For example, the daily and weekly meetings were add-ons to the usual activities of the teams, the maintenance of the implementation plan was set up as a regular activity. At the same time, problem solving workshops for structuring approach and addressing problems for finding optimum solutions were introduced as activities, whenever needed. In order to keep an ongoing setup for continuous improvement opportunities, process observation activities were set up in manager's agenda, as well as for the key team members and specialists, with a follow-up loop in the creation and maintenance of the standard operating procedures documents, as these documents ensure continuity, error rate decrease, preparation of new employees. These standard operating procedures are part of a continuity plan, considering the importance of communication and communication planning in business continuity overall [15]. Although multiple benefits were recorded, both qualitative and quantitative, together with the fact that the management system provides the basis for self-sustainability, some derived implementations of improvements can be identified as being properly allocated to separate projects, especially where software developments and dedicated teams are needed.

## **CONCLUSIONS**

This paper presents the implementation of a Management System Model for Operational Excellence in an insurance company. The implementation was organized as a pilot project in the organization, with 10 teams working on core processes of the organization. Management and reporting tools were implemented, such that to permanently monitor the status and progress of implementation, as well as the benefits and results. The benefits of the implementation are both qualitative and quantitative, as shown in the Implementation section above. As a result of this implementation, the management of the company decided to extend the implementation of the Management System Model for Operational Excellence in the entire organization.

The implementation of this Management System Model for Operational Excellence offers competitive advantage on the market, increased motivation and retention rates for leaders and staff. Overall, this management system offers great opportunities for learning and development of managers, as a permanent motivating factor for existing staff, talents and aspiring leaders. This sets perfect grounds for growing talents, as well as important factor to attract new talents.

The results of this study are limited to the insurance sector. However, pilot projects could be organized for implementing the model to any services industry. Out of scope for the applicability of the model can be the organizations from the manufacturing industry, where specific tools and management processes could be more appropriate (e.g. Toyota Management System), especially for the teams with activities and processes directly relating to the manufacturing process. On the other hand, the model could be appropriate for support and auxiliary processes in

these organizations, where the same principles of continuous improvement and customer focus could properly be applied, in order to meet objectives and have an overall focus towards meeting customer needs and expectations. There is opportunity for further research to be performed, in order to analyze whether an extension of this model can be considered for other industries, such as manufacturing industry. Extensions could be considered, as a result of further research studies, with or without changes of the designed model.

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