



Excellence Award Judging Submission

Transformation Excellence

Submission By: **Wilcox Limousines**

Section 1: What you achieved

- What results are you getting and what has the feedback been?
- How are you measuring the benefits?
- How are you sustaining the momentum/ outcomes?

We are applying for the Transformation Excellence Awards because we have achieved a momentous transformation in our 75-year-old family coachbuilding business.

From a business with no strategy or quality management system, we have reinvented ourselves to a lean, agile, customer centric, creative and dynamic workplace.

In only our third year of our five-year plan we have already achieved so much. Some of the benefits are:

Lower build costs and higher profit margins

- * Reduced overheads
- * An optimised quicker build time
- * Improved design quality and final product
- * Higher employee engagement, resulting in a happier work force
- * Continuous employee training enhancing their skills
- * An agile team with transferable skills





* Increased customer engagement and satisfaction

* Solid company structure, that's reviewed and shared company wide, which gives a feeling of safety and security

Our transformation journey began in 2020, the most challenging period in our 75 years of trading history. Wilcox's newly appointed Managing Director Jade Wilcox had a vision. A vision to reset every part of the business.

Her strategy was based on the transformation triangle technique, which entailed delivering a combination of top down, bottom-up and cross functional core process redesign. Three years later the collaboration between the entire Wilcox team has surpassed our expectations and has brought new levels of achievements previously thought impossible.

When the pandemic hit and production came to a halt, we realised that this was the perfect opportunity to fundamentally alter the course of the business. When facing exceptional difficulties, adapting is the most effective means of survival and prosperity. We did just that!

We focused on 5 key areas:

1. Strategic Planning
2. Engagement with Interested Parties (customers, suppliers and employees)
3. New Product Introduction (included within S.P 2.3.1)
4. Process Management
5. Quality Culture

1. Strategic Planning: For the first time in our history, we now have a strategic plan. In the past it was inside the leadership's heads, it was never shared with the wider team. Now, we have a written strategic plan, that is reviewed regularly. Initially it was monthly and recently changed to half-yearly.

To date, we have successfully completed nearly half of the 37 Strategic Projects (S.P) listed in (Slide 2) (Indicated by a strikethrough).





* S.P 1.2.1 (Slide 3) Develop a strategy for products at all price points: Due to the nature of our products we rely heavily on donor vehicles that must meet specific requirements. The product strategy; which is frequently reviewed and updated enables us to anticipate and prepare for model changes and discontinuations, preventing us from being caught off guard. Prior to creating a product strategy, model discontinuations and changes have crept up on us leaving us scrambling to find suitable replacement vehicles or makeshift parts. This year we will be introducing a technology strategy.

* S.P 1.3.1 (Slide 4 & 5) Develop a marketing strategy: Conducting market research and developing a marketing strategy based on data and industry insights has resulted in an increased brand awareness and a more consistent brand image. This is reflected in our steady increase of followers, reach and engagement on all our social media platforms. Our newly designed website offers a user-friendly experience leading to improved SEO rankings and higher page visits. On a monthly basis we now run analytics to allow us to follow the Plan, Do, Study, Act which determines what's a success and where we need to improve.

* S.P 2.1.1 (Slide 6) Establish a process for monitoring warranty including management metrics for warranty costs: To address longstanding warranty issues and improve the production process, we implemented a red card system that feeds back into a reinvigorated engineering/production change request system preventing them from carrying over this is call our ECR/ECN process, if a problem is identified then the department leader will put in a change request which is reviewed by engineering and all the other departments it will affect, when this is signed off by everyone an engineering change notice is issued to point where the defect is created . This represents a significant shift for our business, which previously repeatedly fixed warranty issues without resolving the root cause. For example, the tailgate on every one of our XJ hearses drops and rubs against the lights, meaning every XJ hearse we took in as part exchange needed this issue repaired. With our new red card system, we can identify and resolve these issues more systematically, leading to fewer warranty issues, better product quality and increased customer satisfaction in the long term. We will however not see a measurable effect of this for many years until our older products go out of use.





* S.P 2.2.1 (Slide 7 & 8) Establish a process for monitoring rework including management metrics for rework: A blue card system was established for monitoring and managing rework. Like the red card system this feeds back via our quality system to the factory. The benefits of this system are both short- and long-term. In the long term as we reduce the issues that cause rework, we expect to see continued improvements in our efficiency, with reduced variability in build times and the potential for implementing theories such as Takt time. In the short term, we've already realized gains through quick wins that have saved us over 4,423 hours of (hands on) work.

* S.P 2.3.1 (Slide 9) Develop & Deploy the INP (Introduce New Products) Process: The INP Process is a series of interlinked steps that manage the marketing, sales, engineering, initial production, test and validation using cross functional processes. Notably, we incorporated customer focus groups and meetings to better understand customer needs and perspectives, such as the Funeral Director's attitudes and perceptions towards electric hearses. These insights allowed us to define and deliver the market requirements more effectively giving us a competitive advantage.

This has revolutionised the way we develop and deliver products. The results of this are multifaceted, not only do our new product introductions run quickly but all the requirements that the modern approval system requires are met at the start of the process. Our first build of the Bentley Flying Spur based Hearse that follows this process is 29% quicker than its predecessor the Jaguar XJ, saving 353 hours per car or £14,120 across 100 vehicles this will save us at least £1.4 million in people hours. By improving operational efficiency, we can increase our output without exerting additional effort.

* S.P 2.4.1 Establish a process for monitoring, controlling and communicating variable costs including a management metric;

* S.P 2.5.1 Establish a process for management review of staff utilisation;

* S.P 2.6.1 Develop Financial planning and reporting process;

* S.P 2.7.1 Develop OWC measurement & Control System: (see Slide 10 for examples) These measures are used in our monthly management meetings, this has helped us buffer ourselves against the effects of covid (our current figures include a buffer stock of vehicles that we are retaining during the chip shortage of over £2 million).





Better financial monitoring has also meant we have been able to respond to future risks in cash flow. Monitoring absence levels in employees has enabled us to respond appropriately when individuals have required support. Prior to this we had very little financial measures in place and anything that was collated was frequently only seen by the directors of the business not by the wider management team. The data was often inaccurate and incomplete, this increased oversight means we can react promptly to issues, plus measure the controls we are putting in place for effectiveness.

* S.P 4.4.1 (Slide 11) Develop a social strategy that supports the family values and brand: We decided that this project was already incorporated into the business in multiple areas and didn't need a separate plan however we emphasised this and ensure this is at the core of everything we do as we are the only UK Family Funeral Coachbuilding Company, and we sell to mainly Family Businesses.

* S.P 5.1.1 (Slide 12) Design and Deploy a customer engagement process, this has resulted in a rolling increase in customer engagement on all social media platforms: This is at a time when we had a significant reported drop in incoming enquiries due to the pandemic, we have also started publishing a monthly customer newsletter and are just in the final stages of launching a CRM system that will link to marketing campaigns. We have clear data on customer expectations regarding electric vehicles, enabling us to identify suitable donor chassis.

* S.P 5.2.1 (Slide 13 & 14 & 15) Design and deploy an employee engagement process: Led us to conduct our first ever employee survey and the companies first Town Hall event. The leadership team reviewed and identified key rapid improvements from the employee survey; a subsequent survey showed some improvement however there is still extensive scope for perfection.

We have huddle boards, Morning and Afternoon huddles across the business to communicate key pieces of information. Plus, a monthly employee newsletter. We now have an improved sick pay support scheme. Employees are trained up and becoming skilled in multiple areas. We have more two-way communication, face-to-face discussions with both individuals and as teams. Department heads are talking to one another more.





Breathe our new HR software has been implemented, allowing it to be far easier for holidays, two-way comms. Sickness and absence have reduced by at least 14%, probably more (our recording of this data was poor in the past).

2. Engagement with interested parties (customers, suppliers and employees):

Information was collected regarding customers, competitors, suppliers, changing market dynamics and employees, during our strategic planning.

Improving communication with customers, suppliers and employees was identified, this established a strategic goal "Improve communication". The projects planned to achieve this are shown in (slide 2) and what has been delivered is shown in (slide 11-16). Positive feedback has been received, e.g. "I have been visiting Wilcox for 4 years and I can honestly say there is a new found energy and buzz about the place, the team seem more motivated, team members are actively looking at ways to improve, as well as addressing any issues within their department." Julie Eley, Simpler Safety

We have worked on programs to increase our two-way communication with both employees and customers as discussed in the strategic projects above. The data on this is hard to quantify how do you measure you are communicating better? We ask ourselves this question regularly. Anecdotally the leadership team have had customers talk about our increased presence and that they are always seeing us within trade publications and on social media.

With employees we plan to do another survey and town hall later this year.

4. Process Management: We are building multi-level deployed processes to effectively manage the business, (Slide 17).

The effectiveness and efficiency of the processes are monitored, (Slide 17)

We have built a NPI process to lead the design and introduction of new ranges, (Slide 9)

In parallel to this, all process managers within the business received training on how to map their processes, recognising the needs of their customers and suppliers (Slide 18)





We are retaining organisational knowledge via process mapping of tasks and our skills matrix, ensuring no one person knows how to do a task, this was a major risk within our organisation. We have also just about to launch an integrated ERP system with a CRM element.

The results of this work have yet to be fully appreciated as we commence building our new products this year, we expect to see large differences in build times (as already experienced with the Bentley Hearse), rework, and warranty.

Our Bentley Flying Spur based Hearse that follows the NPI process has taken half the research and development time compared to its predecessors. Our first build of this product has a build time of 785 hours compared to our current XJ which takes on average 1138 hours using our old process.

We are seeing early results that our new products will have larger margins than their predecessors. In the past it has taken us about seven vehicles before we become profitable on any new project, with the Bentley Hearse we were in profit within two vehicles, with the Limousine it was four vehicles. The margin on old vehicles was highly variable averaging at 7.7% for hearse and 11.2% for Limousines. The Bentley Limousine is already averaging at 15% and the Hearse at 7%. These are amazing considering these vehicles have been built during the biggest supply chain shock our company has ever experienced with some lead times increasing to three times the normal.

5. Quality Culture: We recognise that cultural change is key to delivering our plans, therefore we have spent considerable effort supporting employees.

Our quality culture starts with strategic planning (Slide 21) this process interlinks with continual improvement. The strategy is managed using a Hoshin matrix, (Slide 21) with the strategic actions developed into project charters with inter departmental teams.

The strategy has been condensed into a presentation that has been communicated bi-weekly to process managers with the leadership team, to improve communication and create alignment. As the process managers gain confidence, they are feeding the strategy down to their teams, (Slide 21).

We developed our Family Values ICARE (Slides 11 & 21), which are built into the appraisal process. The process managers brainstormed with the leadership team on how we build the culture within the business to meet these values.

The strategy was presented to all employees at Wilcox's first ever Town Hall meeting, (Slide 14), giving all employees an opportunity to discuss and input into the strategy.





HR systems are improved to support our new ways of working (Slide 13).

An error feedback system has been established (Slides 6, 7, 8, 17, 18, 19 & 20) that feeds into the managers and leadership team.

PDSA is applied to continuously review and improve e.g., in Marketing (Slide 23).

Section 2: Why you did it

- Why are you doing what you are doing and what did you hope to achieve?
- How does this initiative support the strategic direction and values of your organisation?

Wilcox Limousines was founded 75 years ago and is a third-generation family run SME that specialises in the conversion of cars into Hearses & Limousines (see Slide 1). We function in an oligopoly and believe that focusing on our customers, the environment and continuous improvement are essential to our customers, whilst providing us with stability and a competitive advantage. In March 2020, during the most difficult trading time in our history, we began resetting every part of the business. This journey started before then when our MD Jade Wilcox was looking at ways to reinvigorate the business that had grown from a small one garage hand crafting operation to a multiple site manufacturer but had practices that remained much the same since her grandfather's time. She attended a conference that discussed a government grant the NMCL, that offered SMEs tutoring and mentoring to improve, we used this tutoring and mentoring to step change, every part of the business, well more than step change, we would equate it to climbing a mountain range.

For us particularly during the pandemic and the rapidly changing world that automotive has become this is do or die, we will not survive or thrive if we do not fundamentally change.

This is about keeping our family of employees in jobs for another 70+ years.

For Jade and the other members of the family involved in the business this is personal, our grandparents came from nothing to set up this business we cannot let them and our wider family of the employees down.





Section 3: How you did it

- How did you go about achieving the results you did?
- How did you structure your way of working?
- How did you go about involving stakeholders, gaining their buy in and support?
- How did the team pull together to achieve an excellent outcome?

he real catalyst for our fundamental change started with the NMCL grant, the tutoring it provided light the fire for us as a team, however we must be clear that whilst the support and tutoring we have had has been excellent none of it would have been achieved if we hadn't had the drive and determination to make it happen and if our MD Jade hadn't spent hours applying for it in the first place!

The strategy and strategic projects have driven everything (slide 3) We developed the strategy using the following tools:

* PESTLE

* Porter's 5 Forces

* SWOT

The Managing Director and all the Leadership Team (made up of sales, marketing, production, and finance) are involved in developing and delivering the strategy and strategic projects.

The team had never done strategic projects before and at first, we struggled to deliver, not helped by the pandemic. We initially trialled the team leader completing a weekly report (Slide 25). After reviewing this process with the teams, we found they were spending too long completing the form. We switched to placing all the tasks required to deliver the project onto Microsoft planner and reviewed this weekly, this made the size of the tasks appear smaller although some still had difficulty delivering. The current theory we are testing is pausing the weekly meetings to allow the teams some time to complete the vast amount of work they are already doing before restarting them again in the summer. To ensure projects continue to progress the MD checks in with the project lead on a regular basis.





We are moving away from an authoritative to an adaptive collaborative style of leadership, meaning the leadership team;

1. Discuss changes, issues, tasks with process managers to gain their insight.
2. Support process managers to deal with issues themselves via coaching during the twice monthly meeting.
3. Listen and respond to communication from all employees and communicate with them (Slides 11-15, 17 & 19).

When building our strategy, we wanted to manage the workload by targeting the most effective projects first, to identify these we mapped them on an impact effort matrix and tallied the number of objectives that were met by each project (Slide 2 & 18) both tools indicated that building a NPI process would be a key driver.

Another aspect to our success and how we managed the transformation is our resource management, not only the finances but the people and the facilities (including the working environment). We have worked on improving this both immediately and planning for future success.

Prior to 2020 the monthly financial report was a few numbers on a spreadsheet reviewed by the leadership team it is now monitored using a report that contains control charts, bar graphs and tables, (Slide 10). During the NPI process the costs involved in any new project are planned to include a cash flow forecast.

There are two interlinked strategies to manage employee resource, (Slide 17). This is combined with process mapping to give a measure of operatives required on each task to meet Takt time, now and in the future. We utilise a skills matrix to understand the skills of our employees (resources) (Slide 28).

The process mapping within manufacturing has allowed us to build a value stream map that in turn can be converted to a future state map (Slide 26), this combined with a full bill of materials generated via the NPI process means we have a structured way to decide on our infrastructure and material needs.

The business is utilising 5S theories (Slide 27) to transform the working environment. This gives us an opportunity to control tools and other items within the factory preventing quality issues. It also means that we have gained space and can consider moving processes around to ensure optimal workflow.





Completing this entry, we did ask ourselves how we have done so much in such a short time. We have done this because we knew the importance of change and are passionate about delivering success for everyone in Wilcox, we will not stop until we succeed.

Section 4: What you learnt

- How was learning captured, actioned and shared to benefit others?

The business has learnt a vast amount in a short period of time, we are capturing this in multiple ways, often using the sharing of tools and information within cross functional teams.

To continue our improvement journey and cycle of learning we are implementing a cycle of continual improvement that is linked to the strategy (Slides 6 - 8, 19 - 21). This encompasses every area and person within the business. So that everyone learns and continues to learn.

We have developed as a leadership team through specialist training and coaching (Slide 24)

The process managers attend training and coaching in process mapping and the use of quality tools such as 8Ds & 5S. They meet every other week with the MD and another member of the leadership team (Slide 18). The first 6 months focused heavily on HR and managing people and we believe it has given the process managers the confidence to effectively lead their teams and improve our culture. We are creating a learning environment through sharing knowledge and ideas, understanding what others would do in various situations.

We are extending our skills matrix based to reflect the processes required throughout the business to give clear direction for what employees need to learn.

Mapping out every process, is enabling us to retain the learning.

We are building “how to guides’ to retain the knowledge for tools that are not used every day.

The practical application of PDSA, across the business (Slide 23) is ensuring that we only act when appropriately indicated by the data but that we also continue to learn and grow. An example of this is, our marketing team conduct a brief meeting after trade shows (with the cross functional team





who attended) where it is recorded what went well and what could be improved. This information is retained on a virtual whiteboard ready for when we plan the next trade show.

We hope that you can see the results of our learning and innovation throughout the supporting slides.

Our entry showcases the outcomes of our innovative and transformative journey, which we are proud to share with you through the supporting slides. Your consideration of our submission is greatly appreciated, and we are committed to ongoing development, learning, and improvement as we strive for excellence.

