

Appendix A

Table 1 Submersible market by type over the last five years with year 5 most recent in €million by value in € million

Standard by year – year 5 most recent – by area

	1	2	3	4	5	8
UK		15	12	11	9	8
Europe		7	9	11	13	14
US		34	25	21	18	14
Pacific		15	22	27	25	23
Other		21	23	27	31	32

Sophisticated by year – year 5 most recent – by area

	1	2	3	4	5
UK	8	11	18	16	15
Europe	20	23	25	27	32
US	42	55	68	84	102
Pacific	8	22	34	37	45
Other	5	7	12	15	18

Table 2 Valve market by type over the last five years with year 5 most recent in million by value in € million

Standard valves by area

	1	2	3	4	5
UK	67	77	82	84	88
Europe	256	287	321	310	287
US	189	234	254	210	187
Pacific	176	165	132	134	143
Other	146	156	143	134	123

Sophisticated valves by area

	1	2	3	4	5
UK	5	10	11	15	14
Europe	78	134	145	167	178
US	99	145	169	201	250
Pacific	110	167	178	234	267
Other	34	45	55	65	82

Table 3 Burke standing with average for industry submersible assessment maximum score ten, minimum one.

Factor	Burke result	Industry average
Sales expertise	0	7
Customer contact	4	9
Design skills	6	6
Flexibility	6	5
Sophistication	3	8
Speed of production	2	9
Delivery promises	4	10
Pricing	7	6
Quality of work	8	7
Technical support	3	9
Spare parts	5	8
Literature	2	9

Table 4 Burke standing with average for industry valve industry assessment maximum score ten, minimum score one.

Factor	Burke result	Industry average
Sales expertise	5	7
Customer contact	6	8
Design skills	4	6
Flexibility	3	9
Sophistication	5	8
Speed of production	4	9
Delivery promises	7	10
Pricing	7	5
Quality of work	9	6
Technical support	6	9
Spare parts	4	7
Literature	3	8

Table 5 Burke standing with average for industry general manufacturing maximum ten, minimum score one.

Factor	Burke result	Industry average
Sales expertise	6	5
Customer contact	4	3
Design skills	6	5
Flexibility	6	6
Sophistication	6	5
Speed of production	6	6
Delivery promises	6	4
Pricing	5	6
Quality of work	8	7
Technical support	7	6
Literature	6	3

Table 6 Burke Engineering sources of revenue and profit in € million by value by year, with year 5 the most recent.

Turnover By Year

Sector:	1	2	3	4	5
Undersea	32	35	38	39	39
Valve	6	8	11	14	16
General	4	8	15	16	17
Total	42	51	64	69	72

Profit/ Loss By Year

Sector:	1	2	3	4	5
Undersea	3.1	3.2	1	0	-2.2
Valve	0.7	1.2	1.5	2	2.7
General	0.4	0.8	0.6	0.5	0.3
Total	4.2	5.2	3.1	2.5	0.8

Table 7 Burke Engineering geographical areas. Percentage contribution to revenue and profitability by year, with year 5 the most recent.

Sales

Year/Region	UK	Europe	US	Far East	Misc
1	67	12		9	12
2	55	15	3	12	15
3	52	13	3	14	18
4	51	14	4	13	18
5	49	15	5	11	20

Profit

Year/ Region	UK	Europe	US	FE	Misc
1	35	28		18	19
2	32	26	5	18	19
3	31	27	6	15	21
4	30	27	6	18	19
5	29	28	7	22	14

Table 8 Burke Engineering customer contribution turnover and profit by customer type and year in percentages with most recent year 5.

Turnover by Year

	1	2	3	4	5
Government	55	57	49	46	48
Chemical	35	31	29	37	35
Oil	4	6	3	7	12
Water	5	5	4	7	3
Other		1	1	6	3

Profit by Year

	1	2	3	4	5
Government	45	43	32	29	27
Chemical	42	45	49	42	45
Oil	9	6	9	9	15
Water	3	2	9	15	13
Other		1	4	1	5

NB The "other" category tended to consist of other manufacturing companies in metal working and allied trades.

Table 9 Burke Engineering proportion of turnover from top ten customers and total number of customers by sector by year with most recent year 5

Percentage turnover by year

Sector:	1	2	3	4	5
Undersea	68	69	70	65	67
Valve	15	14	15	13	11
General	55	50	35	39	41

Total number of customers by year

Sector:	1	2	3	4	5
Undersea	22	21	18	19	19
Valve	230	270	315	322	381
General	32	36	38	35	31

Table 11 Burke Engineering personnel resource analysis indicating numbers employed in each area their skills level (3 highest, 1 lowest) the cost to the company and the area that each department occupied in square feet)

		Skills	levels	Area sq metres	Cost
	1	2	3		
Design					
Drawing	7	3	2	250	200000
R&D			5		125000
Production					
Tool-room	17	10	8	450	700000
Foundry	10	5	5	1000	250000
Machining	80	38	38	3500	1700000
Assembly	3	5	5	500	360000
Inspection	2	10	10	250	180000
Maintenance			4		80000
Logistics					
Warehouse	10	1	1	12000	200000
Transfer		3			36000
Physical	2	2	4		70000
Administration					
Finance	15	3	4	3000	350000
Data process	5	2	1	1500	160000
Secretarial	12	6	2	1800	240000
Marketing	1		3		85000
Canteen		1	1	8	80000
Security		6	1	1	95000
Other				2	22000
Total	164	79	81	81	4933000

Notes: 1. The high salaries in marketing reflect the remuneration of the technical sales engineers.

2. The other category in administration included the staff reporting directly to the office manager

3. Salaries and costs within the workforce had grown at the rate of 2 per cent above inflation for each of the last five years.

4. All shop-floor staff were entitled to four weeks paid holiday

5. Managers graded the individuals in their departments into three categories for pay, with a 30 per cent differential operating between the top and bottom grade.

Table 12 Management ages, skills on one to five basis with five best, pay in thousands and length of employment in years.

Title	Age	Skill	Pay	Employment length
Production Manager	45	2	28	15
Assistant	37	2	24	2
Shift A	45	4	18	28
Shift B	39	5	18	22
Costing	55	2	16	32
Foundry	28	5	18	5
Machine shop	31	4	18	7
Tooling	53	3	22	27
Quality	60	2	18	40
Maintenance	32	5	18	12
Warehouse	45	2	22	27
Assistant	22	5	14	2
Shipping	38	4	18	17
Technical Manager	55	5	28	30
Assistant	27	5	18	6
Development A	24	5	20	2
Development B	26	5	20	3
Design	51	3	24	17
Assistant	24	4	18	6
Finance Manager	44	5	28	2
Assistant	35	2	20	15
Company secretary	63	2	28	47
Security	59	2	28	32
Data process	27	5	28	2
Assistant	22	5	14	1
Canteen	48	3	20	29
Transport	45	3	20	27
Sales A	25	5	20	4
Sales B	29	4	22	5
Sales C	34	3	22	15
Sales D	36	5	22	5
Sales E	31	5	22	3
Marketing	37	5	28	5
Assistant	23	3	16	3
Information	21	2	14	3
Office manager	27	5	22	3

Table 13 Balance sheet for Burke Engineering last two years, with year 2 most recent, in 000,000.

	1	2
Assets		
Fixed land	570	602
Fixed plant	102	96
Current stocks	345	445
Current debtors	125	187
Current cash	156	25
Total assets	1298	1355
Liabilities		
Current short debt	324	456
Current creditors	124	298
Net position	850	601
Financed by		
Shares	500	500
Reserve	350	101

Notes: Property valuation is ten years old and based on value for industrial not for retail use. Stocks are valued at directors estimation, normal depreciation rates applied. Short term debt is made up of bank loan.

Table 14 Work load analysis.

Departmental workload is analysed by hours currently worked by category of work, the likely hours required to achieve the demands of the business plan, the percentage decrease in total hours possible by the introduction of new technology, and the percentage increase in quality achievable by the introduction of the technology. Total hours are for current business plan, planned levels of activity in the new business plan and total required levels of activity after introduction of new technology.

	Current	Plan	New tech improvement	%Quality improvement
Drafting	11000	42000		90
Checking	6000	12000		95
Reports	5000	10000		99
Meetings	100	700		
Training	100	1000		
Dead	1000			
Total	23200	35700	6600	

	Current	Plan	New tech improvement %	Quality increase
Design	6000	6000	90	250
Research	2000	80000	90	600
Testing	2000	35000	90	300
Reports	700	1700	90	
Training	100	1000		
Meetings	100	1700		
Dead	100			
Total	8900	125000	15600	

	Current	Plan	New technology %	Quality
Casting	5000	27000		
Checking	1100	3300		
Meetings	100	7000		
Training	100	1200		
Dead	15000	15000	98	
Total	21300	47200	31300	

Machining	Current	Plan	New technology %	Quality
Coarse	120000	550000	90	250
Medium	80000		90	250
Fine	10000	55000	90	250
Checking	10000	45000		
Meetings	100	15000		
Training	100	12000		
Dead	30000	50000	99	
Total	250200	867000	102500	

Assembly	Current	Plan	New technology	Quality
Component assembly	19000	35000		
Component addition	9500	25000	85	
Checking	1500	4500	90	
Meetings	100	1500		
Training	100	2500		
Dead	7500	750	90	90
Total			76000	43950

Total is reduced to 8950 hours after decision to sub contract the component assembly to suppliers.

Inspection	Current	Plan	New technology	Quality
Inspection	8000	30000	98	150
Packing	1100	3500	45	
Dead	1100			
Meetings	100	300		
Training	100	700		
Total	21300	35500	4400	

Maintenance	Current	Plan	New technology	Quality
Repair	12000	13000	99	
Meetings	100			
Total			1320	

Warehouse	Current	Plan	New technology	Quality
Transfer	6000	23000	95	
Stacking	6000			
Control	2000	4000	85	
Loading	6000	8000	40	
Reports	500	7500	90	
Meetings	100	7500		
Training	100	1750	55	
Dead	6000	5000		
Total	26700	68500	8200	

Finance	Current	Plan	New technology	Quality
Invoices	12000	25000	99	
Debiting	12000	15000	45	
Reports	8000	16000	95	
Data	5000	14000	85	
Meetings	100	1000		
Training	100	3000	50	
Total	39000	74000	3680	

Secretarial	Current	Plan	New technology	Quality improvement
Reports	8000	20000	65	200
Letters	6000	9000	75	70
Phone	3000	5000	50	
Meetings	1500	1500		
Training	200	1500		
Dead	16800			
Total	35500	37000	10500	

Technical Support	Current	Plan	New technology	Quality
Journey	5000	18000	10	10
Site	200	15000	45	50
Reports	1500	3000	65	30
Meetings	100	700		
Training	100	1000		
Dead	1860			
Total	8760	37700	29150	

Sales	Current	Plan	New technology	Quality
Journey	6000	22000	10	
Selling	500	1800	55	
Reports	500	1200	30	50
Research	500	2500	50	60
Meetings	500	1200		
Training	100	900		
Dead	500	100		
Total	8650	29700	26000	

Marketing	Current	Plan	New technology	Quality
Journey	800	1200	10	
Reports	500	1700	50	80
Research	500	3000	50	60
Meetings	800	600		
Training	50	300		
Dead	2600	150		
Total	5250	7950	5600	

Table 15 Manpower requirements. Numbers of employees and managers likely to be required after the introduction of new technology by area

Area	Staff levels	Management requirements
Design	7	One combined with research
Research	6	One combined with design
Foundry	18	Two
Machining	58	Four
Assembly	25	Two
Inspection	3	Part of assembly
Maintenance	1	Part of machining
Warehouse	5	One
Finance	3	One
Tech. support	17	Two
Sales	13	Two
Marketing	3	One
Secretarial	9	One
Total	168	Seventeen

Table 16 Skills analysis. Numbers of staff and management in each department at overall levels of skills, first line indicating staff and second line (management) for each department.

Area	Skills structure of department						Total
	1	2	3	4	5	6/7	
Design	1	1		2	3	1	8
(Mngment)			1				(1)
Research	1		2	2	2	1	8
Foundry	4	7	9	1	1		23
(Mngement)			2				(2)
Mching	11	13	4	11	12		48
(Mngement)	1	1	1				(3)
Assmby	5	3	7	5	5		25
(Mngement)				2			(2)
Insption	1			2		1	4
Mntnceh					1		1
Whouse	4		1				5
(Mngement)			1			(1)	2
Finance	2			1	1	1	5
(Mngement)			1				(1)
T.supp	6	3	3	2		1	15
(Mngement)				2			(2)
Sales	2	2	2	2	3	4	15
(Mngement)			1	1			(2)
Mkting	1	1				1	3
(Mngement)			1				(1)
Secrt	2	1					3
Total	40	31	28	29	33	10	171
Management	(1)	(2)	(6)	(5)			(14)
Grand total	40	32	30	35	38	10	185

Appendix B

A Anson

Current position: Development manager A. Age: 28. Number of years with company: 5. Reporting structure: Technical manager, technical director. Line responsibility: None. Staff responsibility: Sales & marketing, finance. Skills level: 3/4.

Past history: Graduate, Briton University, 2/1 production engineering, specialising in systems planning. Years in current position: 3. Special skills: Good understanding of metallurgy and the way in which new metallic compounds can be integrated into the production of new product development. Training over last year: 2 days on new processes in control engineering. Current salary: €27,000. Bonus: € 2,000. Average salary scale on grade: € 24,000 plus € 2,500 bonus. Personal circumstances: Divorced and remarried with four children. Large mortgage and other out-goings.

Promotion prospects: Good.

Appraisal report: all appraisals out of 10 followed by comments. Appearance: (9) Excellent. Administration: (8) All projects completed on time. Attendance record: (4) Poor with considerable problems of attendance; 20 days sickness. Budgetary performance: (8) Good. Technical skills (6) Still below the demands of the task. New project performance: (9) All three projects completed on time. Customer contact: n/a. Supplier contact: (10) Excellent performance. Contact with superiors: (7) Generally well regarded, but reacts with hostility to discipline. Contact with equals: (5) Considered difficult to get on with. Contact with subordinates/ shop floor: (8) Well regarded. Subordinate development: n/a. General comments: A suffers from his poor attendance record, though otherwise his performance is more than adequate. Subordinate comments: The lack of clear direction in development creates substantial problems in achieving an effective level of performance.

J Frayling

Current position: Development manager B. Age: 32. Number of years with company: 8. Reporting structure: Technical manager, technical director. Line responsibility: None. Staff responsibility: Sales & marketing, finance. Skills level: 3.

Past history: Graduate Leinster polytechnic, 2/1 in mechanical engineering, specialised in automotive engineering. 3 years working for an automotive manufacturer in the design of carburetors. Years in current position: 7. Special skills: Has spent time on the production line and has good understanding of the demands on workforce of new products. Training over last year: 5 days on the use of computer aided design and computer aided manufacture. Current salary: €27,000. Bonus € 2,000. Average salary scale on grade: €24,000 plus € 2,000 bonus. Personal circumstances: Unmarried and lives with mother and father. Promotion prospects: Would require greater managerial experience for a line management position.

Appraisal report: all appraisals out of 10 followed by comments. Appearance: (5) Takes little care over appearance. Administration: (6) One of the three project had major problems. Attendance record: (9) Very good, 2 days off. Budgetary performance: (7) Some problems with budgetary control which required additional supervision. New project performance: (9) All three projects completed on time. Technical skills: (8) Adequate, though need development. Customer contact: n/a. Supplier contact: (6) Well regarded, but failures to pass on invoices and provide information to distribution on arrival times. Contact with superiors: (6) Some problems with willingness to reorganise work load to complete specific projects. Contact with equals: (9) Very well liked by other managers in the company. Contact with subordinates/ shop floor: (10) Spends considerable amount of time on the shop floor. Subordinate development: n/a. General comments: J suffers from poor concentration on the administrative side of the job, and is far more interested and involved in the practical implications of the new project development. Subordinate comments: The

lack of control over the new product development process is frustrating and leads to shortcomings in the area of administration.

D Graveney

Current position: Assistant production manager. Age: 37. Number of years with company: 12. Reporting structure: Production manager, production director. Line responsibility: None. Staff responsibility: Production department. Skills level: 2/3. Past history: Entered steel company as apprentice, passed City & Guilds III, currently studying engineering at polytechnic. Years in current position: 6. Special skills: Valve installation throughout Europe and Scandinavia. Training over last year: 5 days computer aided design. Current salary: €32,000. Bonus €2,300. Average salary scale on grade: € 36,000 plus € 1,800 bonus.

Personal circumstances: Married with three teenage children, large mortgage. Promotion prospects: Still lacks experience in managing detailed and complex tasks.

Appraisal report: all appraisals out of 10 with comments. Appearance: (10) Excellent appearance. Administration: (9) Excellent. Attendance record: (8) Good with 10 days absence. Budgetary performance: (6) Majority of projects completed on budget, but some problems with technical issues. Technical skills: (5) Considerable problems with pace of new technology.

New project performance: n/a. Customer contact: (9) Excellent.

Contact with suppliers: (10) Highly regarded by all suppliers and gets excellent cooperation. Contact with superiors: (6) Tends to be too direct. Contact with equals: (5) Tends to be too direct.

Contacts with subordinates/shop floor: (10) Very well regarded. Subordinate development: n/a. General comments: D has a good record in achieving targets, though lacks sufficient technical expertise to cope effectively with problems, and must improve relations with superiors and peers. Subordinate comments: The lack of company support in achieving the necessary level of skills is worrying and demotivating.

J Malran

Current position: Production manager. Age: 45. Number of years with company: 15. Reporting structure: Production director. Line responsibility: Assistant production manager, two shift managers, quality control manager, maintenance manager and 180 shop floor workforce. Staff responsibility: Marketing, technical and finance departments. Skills level: 2. Past history: Entered engineering company as apprentice, passed City & Guilds II. Years in current position: 11. Special skills: knows the problems of the old machinery installed in Burke Engineering and what it is capable of. Training over last year: Nil. Current salary: €35,000. Bonus €3,300. Average salary scale on grade: €28,000 plus €3,000 bonus.

Personal circumstances: Married with children having left home, no mortgage. Promotion prospects: Lacks the necessary enthusiasm or skills to take a more senior position.

Appraisal report: all appraisals out of 10 with comments. Appearance: (8) Excellent. Administration: (6) Considerable problems with paper work. Attendance record: (7) Adequate with 5 days absence, but tendency to turn up late for work. Budgetary performance: (6) Has difficulty handling figures. Technical skills: (7) Understands the existing machinery but has difficulty coping with new systems. New project performance: n/a. Customer contact: (5) Considers that customer contact should be carried out by other members of the firm and that production should concentrate purely on production issues. Supplier contact: (4) Poor. Suppliers always tend to contact assistant production manager. Contact with superiors: (5) Does not seem to be interested in fully explaining the problems of the production department. Contact with equals: (6) Tends to be too direct.

Contacts with subordinates/shop floor: (6) Considered harsh and difficult to deal with.

Subordinate development: (5) Considers that employees should learn on the shop floor. General comments: J has maintained Burke Engineering production by detailed understanding of the current production systems, but finds it difficult to work as part of a team. Subordinate comments: Team work is unimportant; what matters is getting the job done.

D Lovatt

Current position: Costing/Operations Manager. Age: 55. Number of years with company: 32. Reporting structure: Production manager, Production director. Line responsibility: None. Staff responsibility: Sales & marketing, finance. Skills level: 2. Past history: Joined Burke from school as apprentice, left for a period to work in the navy and then rejoined the company. In house training. Years in current position: 21. Special skills: Knowledge of suppliers capabilities. Training over last year: Nil. Current salary: € 33,000. Bonus: € 3,000. Average salary scale on grade: € 34,000 plus € 2,500 bonus. Personal circumstances: Widowed; all children left home. No mortgage or outgoings. Chairman of local horticultural club. Promotion prospects: Nil.

Appraisal report: all appraisals out of 10 followed by comments.

Appearance: (9) Excellent. Administration: (10) All projects completed on time. Attendance record: (10) Never misses a days work. Budgetary performance: n/a. Technical skills (3) Incapable of using computerised costing systems. New project performance: (4) Has problems dealing with the unexpected. Customer contact: n/a. Supplier contact: (10) Spends a great deal of time dealing with suppliers, though this is not effectively part of the job description. Contact with superiors: (9) Always willing to try to achieve required objectives. Contact with equals: (10) Always has time for other members of staff. Contact with subordinates/shop floor: (10) Well regarded. Spends a great deal of time in various departments of the factory. Subordinate development: n/a. General comments: D is well liked but finds new systems and new problems difficult to cope with. Subordinate comments: The company can give me time to learn new ideas and I will get to the required level of performance.

D Orden

Current position: Warehouse manager. Age: 45. Number of years with company: 18. Reporting structure: Assistant production manager, Production manager, Production director. Line responsibility: Warehouse staff. Staff responsibility: Sales & marketing, finance. Skills level: 2. Past history: Entered company from Armed Services as quartermaster sergeant. Years in current position: 18. Special skills: Extensive knowledge of alternative storage facilities in area. Training over last year: Nil. Current salary: €29,000. Bonus: € 3,000. Average salary scale on grade: €28,000 plus €2,500 bonus. Personal circumstances: Single. Lives in rented accommodation. Promotion prospects: Poor as lacks either technical or managerial skills.

Appraisal report: all appraisals out of 10 followed by comments. Appearance: (6) Variable with tendency to wear army uniform. Administration: (5) Has difficulty on occasions maintaining the manual stock system. Attendance record: (10) Excellent. Spends long hours in the warehouse and is always prepared to come in at weekends to cope with deliveries. Budgetary performance: (4) Has difficulty in keeping to budget, partly as a result of the continual alterations in stock levels and changes in delivery times. Technical skills (6) Still below the demands of the task.

Unwilling to consider the introduction of a new computer stock system. New project performance: n/a. Customer contact: (10) Always at pains to help customers with their deliveries. Supplier contact: (10) Prepared to be available at any time to meet suppliers delivery requirements. Contact with superiors: (7) Generally well regarded, but reacts with hostility to discipline. Contact with equals: (5) Does not get involved in contact with other

members of management. Contact with subordinates/shop floor: (10) Highly regarded as easy to get on with. Subordinate development: (3) Does not see this as relevant. General comments: D manages to run the warehouse effectively, but does not consider that improvements can be effectively implemented. Subordinate comments: Warehouse operation is simple and does not require sophisticated systems.

J Porter

Current position: Office manager. Age: 27. Number of years with company: 2. Reporting structure: Managing director. Line responsibility: Office and secretarial staff. Staff responsibility: Sales & marketing, finance, production. Skills level: 5. Past history: Graduate, Darmstadt University in design and production engineering. Post graduate year in United States working on computer design systems. Three years work with European valve manufacturer. Years in current position: 2. Special skills: Good understanding of demands of engineering industry. Training over last year: Nil. Current salary: €26,000. Bonus: €6,000. Average salary scale on grade: €24,000 plus €2,500 bonus. Personal circumstances: Looking after ill parents. Unmarried. Promotion prospects: Excellent.

Appraisal report: all appraisals out of 10 followed by comments. Appearance: (9) Excellent. Administration: (9) Excellent control over all areas of office management. Attendance record: (4) Has had considerable time off because of family illness. Budgetary performance: (10) Good. Technical skills (9) Excellent. New project performance: (9) All projects completed on time. Customer contact: (8) Deals well with customers. Supplier contact: (10) Excellent performance. Contact with superiors: (3) Considered sharp and aggressive. Contact with equals: (5) Considered difficult to get on with as sharp and demanding. Contact with subordinates/ shop floor: (9) Considered demanding but fair.

Well regarded. Subordinate development: (9) Has been attempting to improve skills throughout the office administration area.

General comments: J is too aggressive and must improve interpersonal relationships. Subordinate comments: Problems once seen must be resolved; they will not go away.

S Hoskins

Current position: Shift manager A. Age: 45. Number of years with company: 28. Reporting structure: Production manager, production director. Line responsibility: Shift A. Staff responsibility: Sales & marketing, finance. Skills level: 4. Past history: Apprentice in steel industry. City and Guilds III. Years in current position: 15. Special skills: Well organised approach to solving problems and achieving smooth transitions from one production task to another. Training over last year: Nil.

Current salary: €30,000. Bonus: €4,000. Average salary scale on grade: €30,000 plus €2,500 bonus. Personal circumstances: Divorced and remarried with one child. Large mortgage and other outgoings.

Promotion prospects: Good, once attitude problem is overcome.

Appraisal report: all appraisals out of 10 followed by comments.

Appearance: (7) Tends to attend management meetings in shopfloor clothes.

Administration: (8) All projects completed on time.

Attendance record: (8) Excellent. Budgetary performance: n/a Technical skills: (9) Excellent as is able to supervise all aspects of the production process whether it be submersible, valve or general engineering. New project performance: n/a.

Customer contact: n/a. Supplier contact: n/a. Contact with superiors: (6) Tends to be too abrupt. Contact with equals: (9) Excellent. Always willing to help colleagues with particular problems. Contact with subordinates/shop floor: (9) Well regarded. Subordinate development: (3) Poor. Has been unwilling to let staff get involved in internal training programmes. General comments: S concentrates too much on the job in hand and fails to

appreciate wider company requirements. Subordinate comments: The important job is to produce quality products.

W Otherwaite

Current position: Shift manager B. Age: 39. Number of years with company: 22. Reporting structure: Assistant production manager, Production manager, production director. Line responsibility: Shift B. Staff responsibility: Sales & marketing, finance. Skills level: 5. Past history: Entered company as apprentice. Worked for many years as technical assistant to overseas customers. Achieved engineering qualifications by correspondence. Years in current position: 5. Special skills: Appreciates production from customers' perspective. Training over last year: Nil. Current salary: €22,000. Bonus: €1,000. Average salary scale on grade: €19,000 plus €2,500 bonus. Personal circumstances: Married with three children. Small mortgage. Promotion prospects: Good.

Appraisal report: all appraisals out of 10 followed by comments. Appearance: (9) Excellent. Administration: (7) Has difficulty with some of the company's internal management forms. Attendance record: (7) Fair, though tends to leave early when no work is available. Budgetary performance: n/a. Technical skills: (8) Excellent. New project performance: n/a. Customer contact: n/a.

Supplier contact: (10) Excellent performance. Contact with superiors: (7) Generally well regarded, but is continually pushing for improvements which the company cannot afford.

Contact with equals: (5) Considered difficult to get on with. Contact with subordinates/shop floor: (8) Well regarded.

Subordinate development: (8) Keen to push subordinates to get additional qualifications.

General comments: W needs to listen more to advice from superior management and not take independent action. Subordinate comments: The lack of clear direction from management creates major problems in job performance.

A Akkba

Current position: Middle East Sales Manager. Age: 25. Number of years with company: 4. Reporting structure: Marketing and sales director. Line responsibility: None. Staff responsibility: Production, finance. Skills level: 5. Past history: Entered company from family business in Middle East oil industry. Years in current position: 5. Special skills: Language and market knowledge. Training over last year: Nil. Current salary: €28,000. Bonus: €2,000. Average salary scale on grade: €32,000 plus €2,500 bonus. Personal circumstances: Unknown. Promotion prospects: Has indicated interest in progressing with the company, but integration would probably create problems.

Appraisal report: all appraisals out of 10 followed by comments. Appearance: (10) Excellent. A very sharp dresser. Administration: (10) Paperwork, especially expenses, is always excellent. Attendance record: (6) Overseas visits tend to extend beyond planned duration. Budgetary performance: (8) Good.

Has achieved sales targets in region. Technical skills (10) Excellent sales skills. New project performance: (7) Competent with new products and new product concepts but lacks sophisticated technical skills. Customer contact: (10) Very good customer contact.

Supplier contact: n/a. Contact with superiors: (10) Excellent. Contact with equals: (5) Not trusted. Contact with subordinates/shop floor: n/a. Subordinate development: n/a. General comments: A is a vital member of the company and has achieved excellent results. Subordinate comments: None.

G Aldridge

Current position: European Sales Manager. Age: 34. Number of years with company: 15. Reporting structure: Marketing and sales director. Line responsibility: None. Staff responsibility: Production, finance. Skills level: 3. Past history: Entered Burke as qualified

engineer after being apprentice in neighbouring firm. Started with technical support. Years in current position: 5. Special skills: Detailed knowledge of installation problems and procedures. Training over last year: 12 days French. Current salary: €28,000. Bonus: €2,000. Average salary scale on grade: €30,000 plus €2,500 bonus. Personal circumstances: Married with two children. Small house. Wife is personnel manager with local transport company. Promotion prospects: Moderate as G lacks management skills and language competence.

Appraisal report: all appraisals out of 10 followed by comments. Appearance: (7) Adequate. Administration: (7) Adequate Attendance record: (10) Excellent. Budgetary performance: (10) All sales targets achieved. Technical skills (6) Still below the demands of the task. New project performance: n/a. Customer contact: (6) Complaints about the inability to train local staff because of language shortcomings. Supplier contact: n/a. Contact with superiors: (7) Generally well regarded. Contact with equals: (10) Very supportive to other sales representatives and the marketing department. Contact with subordinates/shop floor: (8) Well regarded. Subordinate development: n/a. General comments: A could do substantially better with an improved knowledge of language and sales techniques. Subordinate comments: I feel that I do not receive enough support in overcoming my problem areas.

B Wilson

Current position: Technical manager. Age: 55. Number of years with company: 30. Reporting structure: Technical director. Line responsibility: Assistant manager, development managers, drawing staff. Staff responsibility: Sales & marketing, finance. Skills level: 5. Past history: Entered company after service in the armed forces in technical design department. No formal qualifications. Years in current position: 23. Special skills: Detailed understanding of current Burke Engineering customers and their demands. Training over last year: Nil. Current salary: €36,000. Bonus: €2,000. Average salary scale on grade: €44,000 plus €2,500 bonus. Personal circumstances: Divorced. Promotion prospects: Poor.

Appraisal report: all appraisals out of 10 followed by comments. Appearance: (9) Excellent. Administration: (8) All projects completed on time. Attendance record: (10) Excellent. Budgetary performance: (9) All projects completed on budget. Technical skills (5) Has not acquired computer design expertise. New project performance: (6) Projects tend to be delayed because of problems in design. Customer contact: (6) Considered slow to respond to specific demands. Supplier contact: n/a. Contact with superiors: (5) Demands that is left to run department in own fashion. Contact with equals: (5) Considered difficult to get on with. Contact with subordinates/ shop floor: (4) Abrupt and demanding. Subordinate development: (3) Does not consider this as important. General comments: B has been slow to introduce new technology but is a vital part of the Burke Engineering technical department. Subordinate comments: New systems never work. It is my job to make sure that jobs are completed on time, not train people or play with computers.

C Tomkinson

Current position: Design manager. Age: 51. Number of years with company: 17. Reporting structure: Technical director. Line responsibility: Assistant manager, 2 staff. Staff responsibility: Sales & marketing, finance. Skills level: 3. Past history: Worked for steel industry for 20 years starting as apprentice. Years in current position: 11. Special skills: Knowledge of steel manufacturing processes, and capability of different compounds. Training over last year: Nil. Current salary: €33,000. Bonus: €1,000. Average salary scale on grade: €40,000 plus €4,500 bonus.

Personal circumstances: Single. Large mortgage. Promotion prospects: Poor.

Appraisal report: all appraisals out of 10 followed by comments. Appearance: (3) Dresses

always in old overalls. Administration: (3) Few projects completed on time. Attendance record: (10) Never misses a days work. Budgetary performance: n/a. Technical skills (4) Poor. New project performance: (5) Finds any new concepts time consuming and difficult. Customer contact: (4) Fails to respond effectively to customer requirements. Supplier contact: (5) Fails to keep suppliers informed on product requirements. Contact with superiors: (3) Reacts with hostility to any comments. Contact with equals: (2) Impossible to deal with. Contact with subordinates/shop floor: (2) Argumentative and demanding. Subordinate development: (2) Considered totally irrelevant. General comments: C continues to underperform.

Subordinate comments: Managers should be left to manage.

Z Synstat

Current position: Quality control manager. Age: 60. Number of years with company: 40. Reporting structure: Assistant production manager, production manager, production director. Line responsibility: None. Staff responsibility: Technical department.

Skills level: 2. Past history: Entered company from armed services. Served apprenticeship. Years in current position: 25.

Special skills: None. Training over last year: Nil. Current salary: € 28,000. Bonus: Nil. Average salary scale on grade: € 35,000 plus € 4,500 bonus. Personal circumstances: Widowed and remarried. Three young children. Promotion prospects: Nil.

Appraisal report: all appraisals out of 10 followed by comments. Appearance: (9) Excellent. Administration: (8) Keeps ahead of production demands. Attendance record: (2) Poor with considerable problems of attendance; 30 days sickness. Budgetary performance: (8) n/a. Technical skills (3) Limited understanding of component design and testing procedures. New project performance: n/a. Customer contact: n/a. Supplier contact: n/a. Contact with superiors: (6) Difficult to deal with. Contact with equals: (5) Rude. Contact with subordinates/shop floor: (2) Impossible Subordinate development: n/a. General comments: Though Z completes his required work on time, there is a major attitude problem. Subordinate comments: If people worked harder, there would be no need to get at them.

S Weybridge

Current position: Tooling manager. Age: 53. Number of years with company: 27. Reporting structure: Production manager, production director. Line responsibility: Toolroom. Staff responsibility: None. Skills level: 3. Past history: Apprentice with shipbuilding company, 5 years with toolmakers. Years in current position: 18. Special skills: Good understanding of tool making techniques using standard equipment. Training over last year: Nil. Current salary: € 27000. Bonus: € 1,000. Average salary scale on grade: € 29,000 plus € 2,500 bonus. Personal circumstances: Divorced. Promotion prospects: Poor as limited skills and managerial expertise.

Appraisal report: all appraisals out of 10 followed by comments. Appearance: (5) Variable. Administration: (6) Adequate.

Attendance record: (7) Reasonable. Budgetary performance: (7) Fair. Technical skills: (6) Good for existing technology but poor understanding of new equipment. New project performance: (6) New projects tend to be delayed. Customer contact: n/a. Supplier contact: (7) Does not chase subcontractors hard enough. Contact with superiors: (7) Generally well regarded, but reacts with hostility to discipline. Contact with equals: (5) Considered difficult to get on with. Contact with subordinates/shop floor: (8) Well regarded. Subordinate development: (5) Limited involvement with subordinates. General comments: S is not performing as well as required in a difficult and demanding job. Subordinate comments: The total lack of support in improving work performance is at the bottom of all the problems that are encountered.

D Brewis

Current position: Machining manager. Age: 31. Number of years with company: 7. Reporting structure: Production manager, production director. Line responsibility: Machine shop staff. Staff responsibility: Nil. Skills level: 4. Past history: Diploma in engineering, Wootton Polytechnic. Worked in production in aerospace industry. Years in current position: 7. Special skills: Good knowledge of sophisticated machining processes. Training over last year: Nil. Current salary: € 20,000. Bonus: € 3,000. Average salary scale on grade: €27,000 plus €2,500 bonus. Personal circumstances: Married, two young children. Promotion prospects: Good, provided D gains appropriate management expertise. Appraisal report: all appraisals out of 10 followed by comments. Appearance: (9) Excellent. Administration: (9) All projects completed on time. Attendance record: (7) Good, though time taken for family problems. Budgetary performance: (8) Good. Technical skills (10) Excellent skills development. New project performance: (5) Some problems in maintaining control over complex new projects. Customer contact: n/a. Supplier contact: n/a. Contact with superiors: (7) Generally well regarded. Contact with equals: (9) Considered very cooperative and willing to help; a good team member. Contact with subordinates/shop floor: (8) Well regarded. Subordinate development: (8) D has been pushing hard to improve the skills of the staff in the machining section. General comments: D would benefit from management training and greater responsibility. Subordinate comments: Poor support makes management tasks difficult.