TEAM DYNAMICS

UTILIZING TEAMS TO SPEED IMPROVEMENTS AND IMPLEMENTATION
# MAXIM CONSULTING GROUP OVERVIEW

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- **Peer Groups**: Electrical, Mechanical, Fire Protection, General Contractor, Heavy Civil, Utility, Management Succession, Captive Insurance
- **Corporate Finance Advisory**: Mergers & Acquisitions Advisory, Equity & Debt Financing, Ownership Transition, Management Succession
AGENDA

Section I  Effective Improvement Implementation
Section II  Developing Standards Using SMEs
Section III  Best Practices for Successful Training
Section IV  Case Studies
EFFECTIVE CHANGE MANAGEMENT
ANSWERING THE "WHY"
IDENTIFYING THE PITFALLS OF IMPLEMENTATION

Describe the last failed implementation. Why did it fail?

• ______________________________________

• ______________________________________

• ______________________________________

• ______________________________________

• ______________________________________

• ______________________________________
ENSURING SUCCESSFUL IMPLEMENTATION

Describe a highly successful change inside of your organization. What made it successful?

• _______________________________________

• _______________________________________

• _______________________________________

• _______________________________________

• _______________________________________
CONSTRUCTION OPERATIONS
CONSTRUCTION OPERATIONS IN DETAIL

PARTNERS IN PROGRESS
ALL IN 2020
EFFECTIVE IMPLEMENTATION – ROLE OF LEADERSHIP

Leadership & Management

- Instilling an inspiring vision
- Getting important things done
- Instilling good operational processes
DEVELOPING STANDARDS THE BOTTOM UP PHILOSOPHY
BEWARE OF TOP DOWN DICTATORSHIP
CHANGE MANAGEMENT PROCESS

Select next process to implement

Utilize a team to develop a model for the process

Utilize the team to test the model of the process

Revise or fine-tune the model based on input from the test team

Measure/monitor use of the process

Develop a system to measure/monitor use of the process (if required)

Conduct training/rollout of process in other small groups

Typical Business Processes

- Pre-Job Planning
- Short-Interval Planning
- Daily Production Plans
- Post Job Reviews or Lessons Learned
- Cost Projections & WIPs
- Commodity Partnering Agreements
- Prefabrication & Standardization
- Other Critical Value-Drivers

Select next process to implement

CONCLUSION

PARTNERS IN PROGRESS
ALL IN 2020
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Partners in Progress
ALL IN 2020
CHANGE MANAGEMENT PROCESS

Select next process to implement

Utilize a team to develop a model for the process

Evaluate the model

Revise or fine-tune the model based on input from the evaluation team

Develop a system to measure/monitor use of the process if required

Conduct training/rollout of process in other small groups

Utilize the team to test the model of the process

Revise or fine-tune the model based on input from the test team

Typical Business Processes

- Pre-Job Planning
- Short-Interval Planning
- Daily Production Plans
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Typical Business Processes
- Time/Quantity Reporting
- Pre-Job Planning
- Short-Interval Planning
- Daily Production Plans
- Post-Job Reviews or Lessons Learned
- Cost Projections & WIPs
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- Prefabrication & Standardization
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EXAMPLE: PRECONSTRUCTION PLANNING

• Who is on the process improvement team?
• Why?
PROCESS TEAM

- Becomes your subject matter experts (SMEs)
TRAIN THE TRAINERS
BEST PRACTICES FOR SUCCESSFUL TRAINING
WHO PROVIDES TRAINING

• For Management and Staff?
• For Project Managers?
• For Field Leaders?

Choose Wisely!
DEFINING A NEW PATH FORWARD

NOT THIS!
TRANSFERRING KNOWLEDGE

Mentoring
TRANSFERRING KNOWLEDGE – VISUAL MEDIA
TRANSFERRING KNOWLEDGE

Video
VIDEO CAPTURE

- GoToMeeting
- Demo Builder
- Formal Videotaping
- Online Education
TESTING FOR KNOWLEDGE

• Demonstrated Ability

• Written or Online Testing
MEASURING EFFECTIVENESS

Type of Metrics

• Compliance

• Variance

Success tip: Tie Metrics into Incentive Compensation Program
HOW TO TRAIN

• Right Instructors
• Small Groups
• Interactive
• Workbooks
• Repository of Training Materials
• Testing for Knowledge
CASE STUDY 1: CHANGE ORDER MANAGEMENT

• Definition of the issue
• Creation of team
• Definition of a solution
• Pilot the solution
• Refine the solution
• Create training protocol
• Publish list subject matter experts
• Measure results
CASE STUDY 1: CHANGE ORDER MANAGEMENT

- Definition of the issue – Losing $ on change orders
- Creation of team – Field leaders, project managers, project engineers, accounting
- Definition of a solution – Creation of a change order checklist to identify ALL costs of a change order
- Pilot the solution – Identified three projects to pilot the solution
- Refine the solution – Revised the CO checklist to more closely match actual project constraints
- Create training protocol – Implemented in-person training as well as online training
- Publish list subject matter experts – Creation of online directory of mentors at all levels
- Measure results – Re-evaluate margin gain on change orders on an annual basis – UP 300%
CASE STUDY 2 – PRE-NEGOTIATION WORKSHOPS

• State of Construction
• Economic Outlook
• Future of Construction
• Pre-Negotiation Strategic Planning
• Negotiation
• More Alignment, Far Less Conflict, Increased Vision
CASE STUDY 2 – PRE-NEGOTIATION WORKSHOPS

Mission Statement

Teaming to expand the sheet metal industry through development of leadership with a vision for the future, utilizing our strengths as partners to develop the best workforce, products, and services in the industry.
CASE STUDY 2 – PRE-NEGOTIATION WORKSHOPS

Vision Statement

We will:

• Create an environment where continuous improvement processes are identified and planned for utilizing a collaborative labor-management approach

• Create and maintain a partnership to define training programs to encompass leadership and specific trade skill sets in order to increase the market share in the sheet metal industry, giving the highest quality product in the most expedient manner

• Discuss alternatives to working environments in a collaborative manner that allow for the flexibility and engagement needed to ensure a successful future
CASE STUDY 2 – PRE-NEGOTIATION WORKSHOPS

“From my point of view, it helped us move past the prior contract negotiations and made us be more thoughtful of the other thoughts and opinions at the table. I believe it also helped for us to go back and look at what we discussed during the session...such as the mission statement as well as some of the goals that we had set.”

Dwayne Stephens, SMART Local 9 Business Manager
CASE STUDY 2 – PRE-NEGOTIATION WORKSHOPS

“...it also gave us a chance to talk about each other’s concerns and industry changes without the pressure of bargaining. I felt there was an increased level of comfort and trust in the room among some people that hadn’t spent a lot of time together before we started. The commitment statements allowed us both to come to the table with a shared goal and reasonable expectations and that expedited the process.”

Nathan Cooper, Executive Director, SMACNA Colorado
IN SUMMARY – PATHWAY TO SUCCESS

• Define Standards Utilizing Cross Functional Teams
• Document Training Using Visual Media and Technology
• Train Well, Train Often, Utilizing Internal SMEs
• Measure Compliance and Variance
• Align the Vision, Work From There
QUESTIONS
THANK YOU

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