Leading Change in a Engineering Business

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Today's Signposts (day 2)

- Project initiations and communications

- Building the project team

- Stakeholder management

- Project governance

- Decision making

- Final Board report/presentation

- Post project review and exit

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Reflections, BDEL recap

15 mins

- What are your reflections so far? – group discussion

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Examples of success and failure

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Project Initiation Document

- Leading particulars

- Executive summary (write last)

- Project scope statement

- Project background

- Resources anticipated

- Investment required

- Assumptions, dependencies and constraints

- Governance and accountability statements

- Communications plan

- Initial project plan
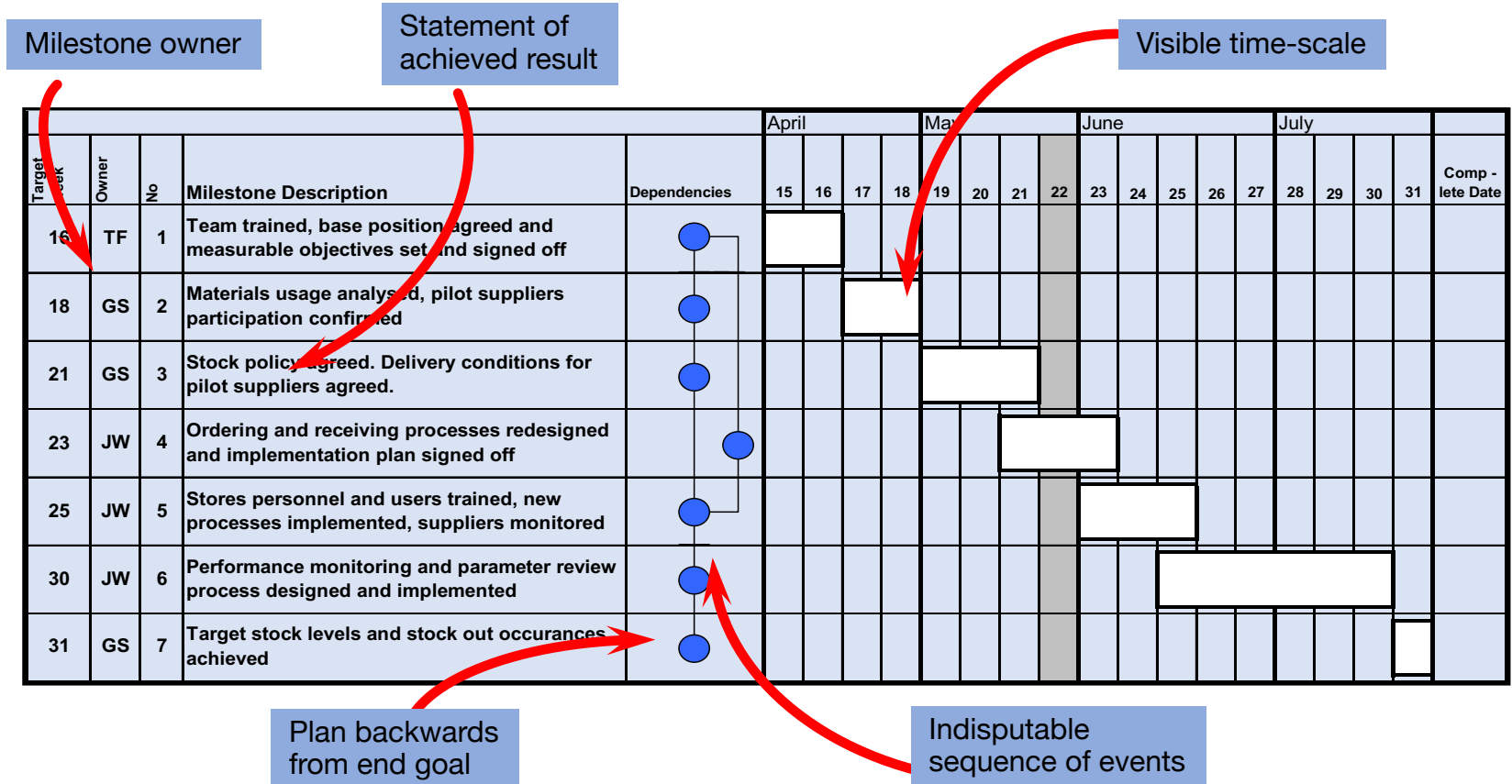
- Initial risks and issues

PID resources

- Give a detailed yet succinct indication of the resources required.

- Show from to dates if applicable

- Indicate departments that will need to provide resources

- Usually an associated 'risk' is lack of provision of resources

Item	More specifically	CR resourcing estimate	External resource required
Mobilisation	This will require meetings with Head of Planning and Production for one day. A visit to Heaton and the Productionisation team for one day.	4 days (Heads of)	6 days
Project management and communications	Steering group attendance. Building communications plans to keep all 'informed' people included. Possibly roadshows towards the end of the build phase.	6 days (Heads of)	2 days
Planning process build	We would expect that xxx company would at least have to meet the same resourcing as EngPro, possibly more depending upon tasks. Ideally this would be current planning team members and might require 2 people working on this together at times. The more internal resource that can be spared, the deeper the capability transfer.	100 days (working group)	60 days
Process review	This is a review period, roadshows and engagement workshops so many people for an hour briefing.	1 day	4 days
The phase one go-live	Xxx company planning team full time for the phased go-live duration, estimated three months.	90 days (working group – BAU)	4 days
Executive reporting	This is mainly an EngPro resource need although there will be various meeting needs throughout the project and go live period.	5 days	10 days

PID - Milestone plan

Milestone owner

Statement of achieved result

Visible time-scale

Target week	Owner	No	Milestone Description	Dependencies	April				May				June				July				Comp - lete Date
					15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
16	TF	1	Team trained, base position agreed and measurable objectives set and signed off																			
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Plan backwards from end goal

Indisputable sequence of events

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PID Comms plan - ideas

- Road shows – hosting a roadshow to demonstrate the new system approach etc.

- Focus groups – gathering future users together and getting their ideas

- Super-users – specifically useful when the change is an IT or process change

- Training courses

- Company magazines

- Company Intranet

- Briefing sheets

- MD forums

- Engineering forums

- Team sessions

- Celebrating victories, both big and small – especially early wins

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- In small groups – discuss your work from last night and refine your PID exercise.

10 mins

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Comms plan considerations

- Know what your audience want, understand their fears, and show how these are not founded and moreover how they can benefit from the change

- Understand what you want to communicate to the groups

- Make great titles to your presentations and roadshows etc. Don't just say a roadshow about the new fleet, "Exciting opportunities with the new fleet" or "New Fleet, Our Future."

- Tell a story, don't just give the facts make it interesting to read, fun, exciting. Tell the story

- Be honest and down to earth, don't flower up things; be straight talking and honest.

- Make it all about 'us' and 'our' and 'together' and 'we'

- Get a call to action in there – okay this is sales speak, but if you are creating excitement and the super-user (for example) are emerging, generate a call to action to get them secured. "Last few days" "Super-user training and selection closes soon, hurry" etc. You are selling the change to this group, don't be embarrassed about using sales techniques in some fashion.

- Keep communications concise, use three words only if you can't use two!

- Always, always, always have your prose proof read. Use people who are good at doing this, we are engineers and notoriously hopeless at writing copy.

Communicating your strategy

Plan-led Production Excellence Strategy

THE OUTSOURCED MAINTENANCE PROVIDER OF CHOICE

PEOPLE

Our team are the heart of the business; we will engage, inspire and develop our team, to take us to new horizons

PERFORMANCE

Performance is the bedrock of the business. We will proactively drive initiatives to continually improve performance

PROCESSES

Underpin all that we do. We will fully adopt the Plan-led, productionised approach. All committing to and delivering THE PLAN.

EFFICIENCY

Builds resilience, improves cost and secures our business for all. We will adopt a LEAN approach, minimize perished labour capacity, ensure all resources utilized

QUALITY AND SAFETY

Performing maintenance well. We will instil in us all a pride in the quality of our output. Zero defects, KPI defects, VMI accur...

MANAGEMENT CONT...

Gaining control empowers us t... make improvements. We will develop metrics and reviews th... place us truly in control of our...

Branding of the strategy
Town hall briefs
Communication centres
Clarity of message
Winning milestones

ROADMAP TO EXCELLENCE

WRITE YOUR SUBTITLE HERE

YOUR TITLE 01
Green marketing is a practice whereby companies seek to go above and beyond traditional.

YOUR TITLE 02
Green marketing is a practice whereby companies seek to go above and beyond traditional.

YOUR TITLE 03
Green marketing is a practice whereby companies seek to go above and beyond traditional.

YOUR TITLE 04
Green marketing is a practice whereby companies seek to go above and beyond traditional.

Local ownership
Governance
Buy-in from above and below
Enthusiasm and confidence
Celebrate the victories on the way

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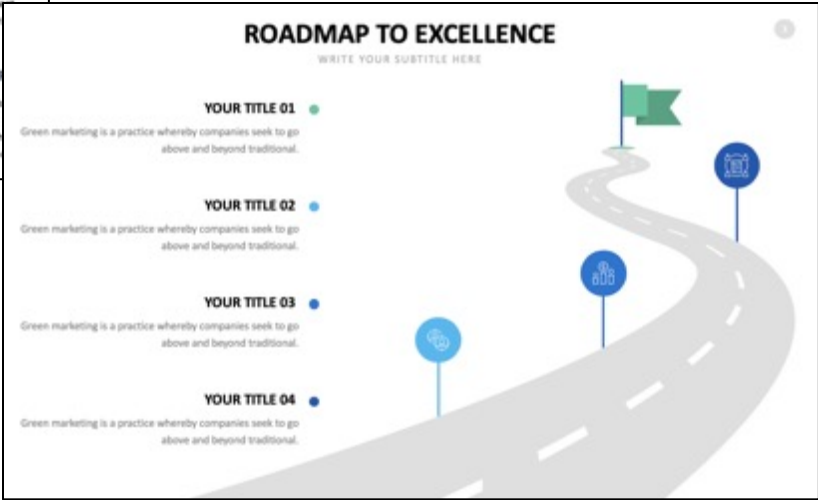
Comms plan for BDEL

10 mins

- Thinking about some of the examples we have just seen, in small groups discuss which of these you might use at BDEL and why.

- List too your considerations and thoughts before deploying them.

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Building the project team

10 mins

In groups discuss the skills, styles, and attributes of the people you'd like to make up a project team

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Change agent skills

- Excellent communication skills

- Ability to inspire others

- Enthusiasm, persistence, and resilience

- Emotional intelligence and empathy

- Strategic thinker – bigger picture view

- Forward thinking

- Decisive

- Confidence

- Sound ethical stance – Integrity

- Self improver

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Personality types
Myers Briggs

Personality types
Belbin

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Team Role		Contribution	Allowable Weaknesses
Plant		Creative, imaginative, free-thinking. Generates ideas and solves difficult problems.	Igno... preocc...
Resource Investigator		Outgoing, enthusiastic, communicative. Explores opportunities and develops contacts.	Over-op... once i...
Co-ordinator		Mature, confident, identifies talent. Clarifies goals. Delegates effectively.	Can be... Offloa...
Shaper		Challenging, dynamic, thrives on pressure. Has the drive and courage to overcome obstacles.	Prone t... p...
Monitor Evaluator		Sober, strategic and discerning. Sees all options and judges accurately.	Lack... inspire...
Teamworker		Co-operative, perceptive and diplomatic. Listens and averts friction.	Indecisi... Avo...
Implementer		Practical, reliable, efficient. Turns ideas into actions and organises work that needs to be done.	Somew... respon...
Completer Finisher		Painstaking, conscientious, anxious. Searches out errors. Polishes and perfects.	Inclin... Relu...
Specialist		Single-minded, self-starting, dedicated. Provides knowledge and skills in rare supply.	Contrib... front. D...

TW – TEAMWORKER
Has high EI and empathy, listens and averts friction.
But! Avoids situations that may entail pressure or conflict

PL - PLANT
Creative, solves difficult problems
But! Strong 'ownership' of ideas, weak co-operation for better results

CO – COORDINATOR
Mature, confident, identifies talent.
But! Takes credit for the effort of a team

ME – MONITOR-EVALUATOR
Sober and discerning, judges accurately
But! Cynicism without logic

RI – RESOURCE INVESTIGATOR
Senses new ideas, explores new opportunities
But! Forgets to follow-up arrangements, disappoints clients

SP - SPECIALIST
Self-starting, dedicated, provides rare knowledge
But! Ignores factors outside area of his interest

CF – COMPLETER-FINISHER
Conscientious, corrects omissions and errors, polishes and perfects
But! Obsessive behaviour Does not delegate

SH - SHAPER
Challenging, achieving, overcomes obstacles
But! Ignores social aspects, can be aggressive, never apologises

IMP – IMPLEMENTER
Organises work, put systems in place
But! Obstructs change, rejects new ideas

SOCIAL — THINKING — ACTION

TW   PL
CO   ME
RI   SP
CF   SH
IMP

© team and I

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Personality types
Insights
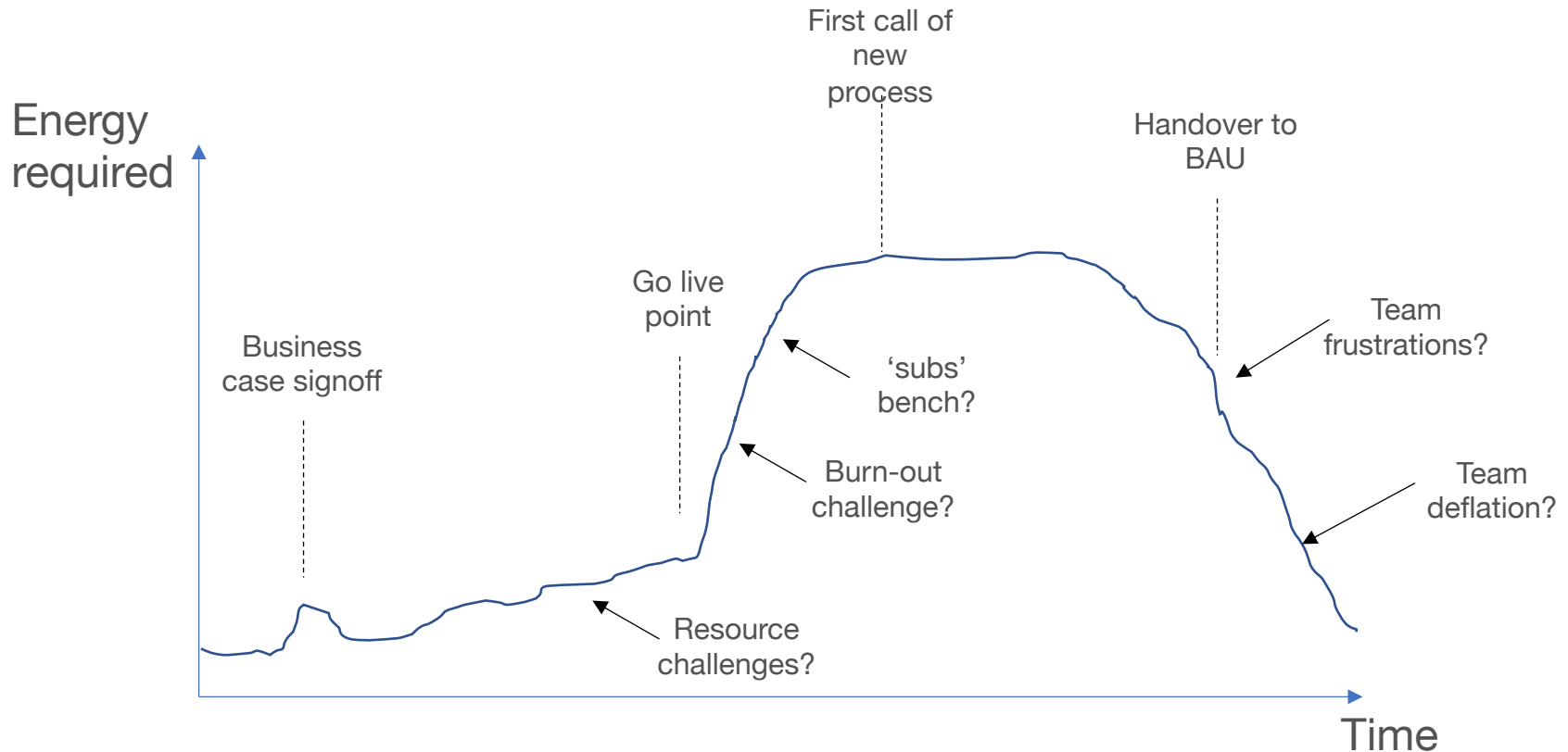
On a good day

On a

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Teams

Forming   Some confusion, High ambiguity, Impersonal, 'Why are we here?

Storming   Frustration, Competition, Opting out, Resistance, Cliques form

Norming   Acceptance, Team spirit, Confronting issues

Performing   Close teamwork, Problem solving, Open and trusting, Confidence, Flexible and Creative

High performance teams characteristics

- Share vision – clarity of purpose

- Both hard and soft visions of the future

- Clear roles and responsibilities

- Robust working approach

- Established team 'norms'

- Interpersonal skills

- Achievement orientation

- Open reviews of performance

Team energy

Energy required

First call of new process

Handover to BAU

Go live point

Team frustrations?

Business case signoff

'subs' bench?

Team deflation?

Burn-out challenge?

Resource challenges?

Time

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Stakeholders

Manage your stakeholders

- Work out who is a stakeholder and why

- Work out their influence and their commitment to your idea

- Evaluate their hot buttons

- Work out what they want

- Wicket role ideas with them

- Involve them in the decision making process

Stakeholder analysis

Who are the key people involved in this?	How influential is this person? (High/Medium/Low)	Decision maker?	Their view of us and what we are trying to do (For/neutral/against)	What does this person want to happen? (Hot buttons)

Stakeholders - Influencing Strategy

Attitude

For — Build coalition → We always NEED somebody here

Neutral — Win over → (We always NEED somebody here)

Against — Leave alone ← Take out of play / Distract or fragment — RISK

Winning on board

Low — Medium — High — **Influence**

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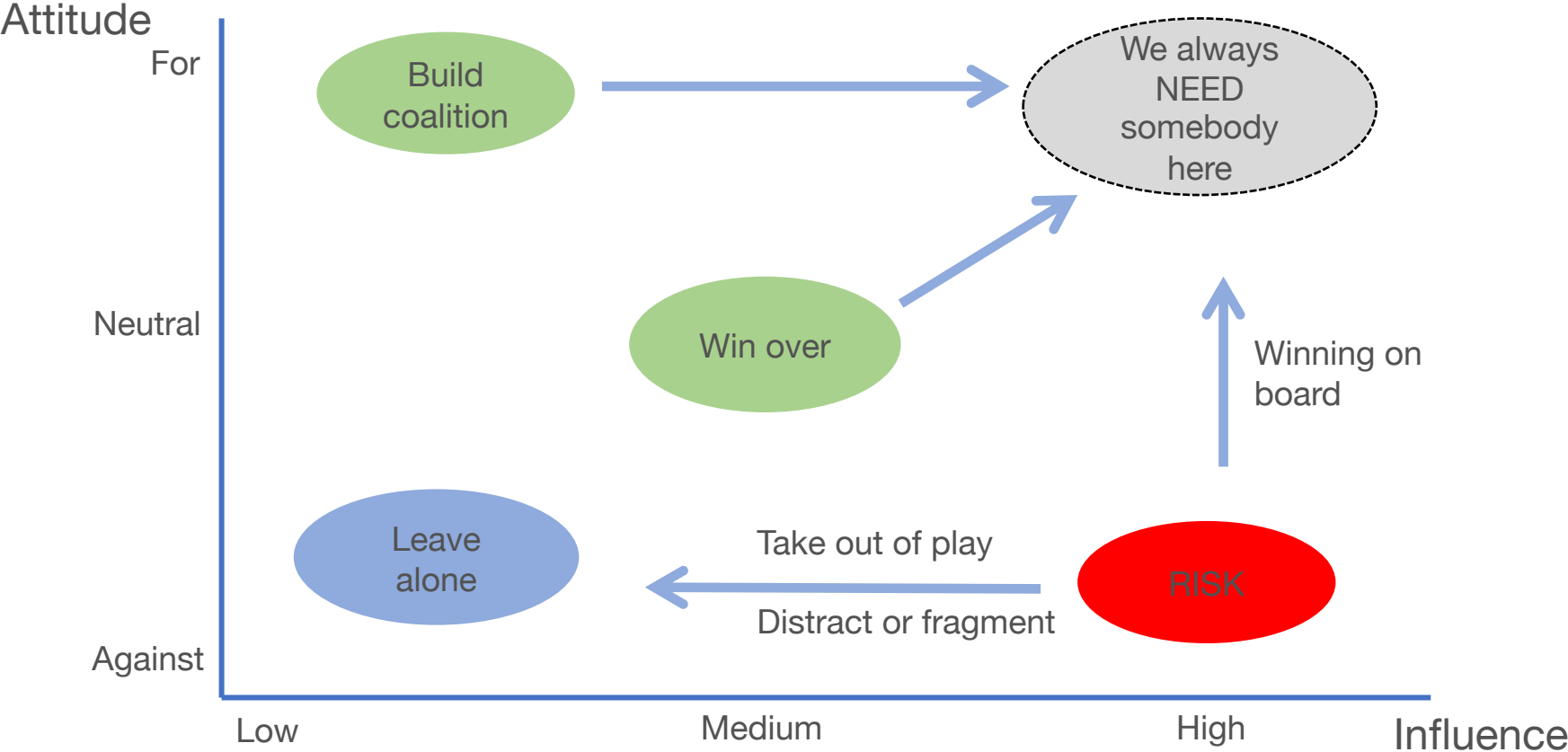
BDEL stakeholder exercise

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12 mins

- In small groups – carry out a stakeholder mapping exercise for BDEL

- What fresh insights has this brought you?

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Governance

Active Executive
sponsorship
and steering group

Fit for purpose
'expert' project
team

Proactive Stakeholder
engagement

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Change project management

This is a large project, collapse down for smaller projects following same principles

Executive Project Board

- Needs board-level (Director) sponsorship
- Meets every month
- Risk escalation and project resourcing

Project Steering Group

- Meets monthly, chaired by Project Leader
- Direction of project
- Action group co-ordination
- Management of risks
- Stakeholder engagement

Project Action Group

Project Action Group

Project Action Group

- Each led by relevant expert manager
- Delivering specific element of scope
- Managing and escalating risks

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Reporting - Seven vital signs

- Stakeholders have high commitment

- Business benefits are realised

- Work and schedule are predictable

- Project team is high-performing

- Scope is realistic and managed

- Risks are mitigated

- (Project) team member benefits are realised

Stakeholders have high commitment

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Executive incentives tied to project results

Investments are made in change management and training

Stakeholder management plan in place and fully implemented

No executive sponsor visible

People resisting or even sabotaging efforts

More energy put into resisting than supporting ideas

No "experts" available

ACTIONS

Stakeholder management plan is fully implemented and maintained

The right sponsor is appropriately engaged

Regular Steering Committee meetings are being held, decisions and actions are being taken in a timely fashion and are effective

All appropriate stakeholder groups are effectively represented

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Business benefits are realised

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A compelling reason exists to implement

Focus on best net downstream benefits, not just cost

The expected benefits are measured and shared

"Why are we doing this?"

"This is costing too much"

Focus is on executing the plan, not achieving benefits.

ACTIONS

The business case is clearly and convincingly articulated

The solution will appropriately support the desired outcomes and costs

The quality of work products is appropriate

Benefits tracking is ongoing and meaningful

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Work and schedule are predictable

Everyone gives the same definition of deliverables

Good evidence and sense of control

Slippage happens only when predicted, and is readily dealt with

Can't describe what finished means

Uncontrolled - poor plans, controls, tracking mechanisms

Slippage comes as a surprise

ACTIONS

Project plan is accepted and used, and there is confidence in progress report accuracy and estimates to complete

Milestones and deliverable acceptance criteria are accepted

Approach is appropriate and followed

Appropriate resources are scheduled

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Planning

- Define work packages and logic and timing

- Define resources and deliverables for each work package

- Plan start and finish points

- Schedule milestones, formal progress reviews, deliverables and invoicing

- Build in communications plan

Complex WBS

#	Traits	Status	Title	Actual Start	Actual End	% completed	Actual Work	Remaining Work	Actual Costs	Given Start
0		▲	New Fleet High level plan	7 Nov 2016		4.88%	178.5 days	3482.5d?		
1		▲	Bombardier Introduction	28 Nov 2016		2.47%	36 days	1420d		
2		▲	Design phase	28 Nov 2016		15.79%	36 days	192d		
3		✓	Concept design	28 Nov 2016	16 Jan 2017	100.00%	36 days	0d		
4		▲	Preliminary design					113d		
5		○	Detailled design					79d		
6		○	Build					780d		
20		○	5 Car Free running and QPAC					336d		
39		○	10 Car free running and QPAC					112d		
46		●	Stadler Introduction	16 Feb 2017		5.32%	20 days	356d		
52		▲	Depots and sidings	7 Nov 2016		6.73%	122.5 days	1697.5d		
53		▲	Manningtree depot	7 Nov 2016		8.29%	72.5 days	802.5d		
54		▲	Depot build	7 Nov 2016		18.35%	72.5 days	322.5d		
62		■	NR Infrastructure	9 Jan 2017		0.00%	0 days	480d		
63		■	Track link to the depot	9 Jan 2017		0.00%	0 days	370d		
64		■	Gain NR Permissions	9 Jan 2017		0.00%	0 days	140d		
65		○	Contract builder					45d		
66		○	Build					85d		
67		○	Possession contingency					100d		
68		○	Signalling changes					60d		
69		○	25KVa wiring					50d		
70		▲	Norwich Crown Point	2 Jan 2017		11.49%	50 days	385d		
95		▲	Coldham Lane					255d		
103		▲	Ilford					255d		
111		■	Stations and Route					2d?		
114		■	Operations					1d?		
116		○	Service Introduction Strategy					6d		

Feedback

Plan

Do

Review

Learn

Risk register
Decision
Escalation etc.

Measure, compare,
review, analyse etc.

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Project team is high performing

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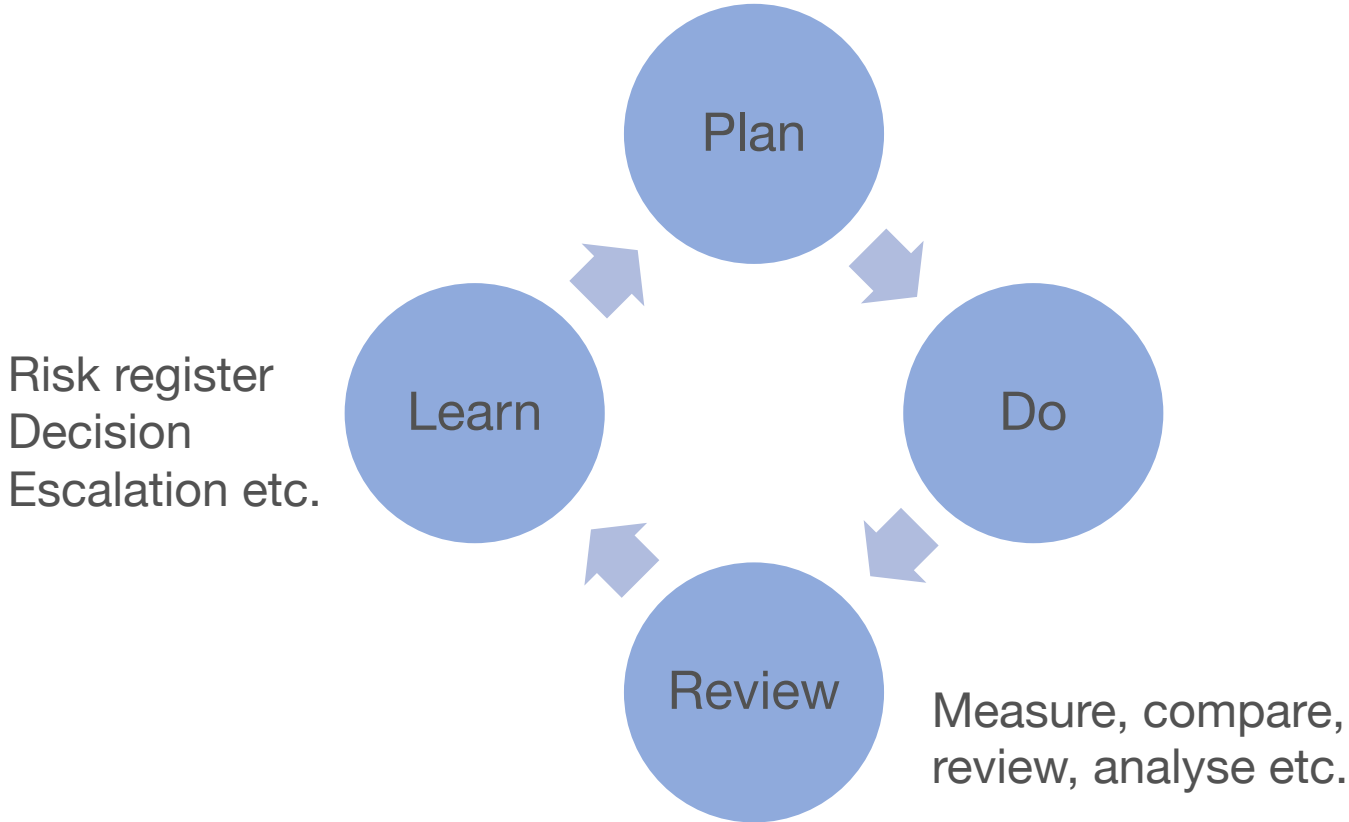
Individuals and groups are supporting each other

Energy is high and positive

High levels of collaboration

The team is diverse

The tension can be felt

Low energy and enthusiasm

Turnover is high

Working conditions are poor

ACTIONS

Appropriate breadth, depth and calibre of skills are engaged

Morale, motivation, energy and collaboration across teams are high

Environment and facilities support productive and effective teamwork

Roles and responsibilities are clear

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Scope is realistic and managed

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Evidence of ongoing healthy challenging and negotiation

Active issues log on scope items

Written agreements and work statements regularly reviewed and updated if needed

Scope is seldom challenged or discussed

Scope issues and problems brushed off

Noteworthy scope issues are not tracked in writing

ACTIONS

Scope management plan is implemented

Organisational, systems, and geographic boundaries are defined

Scope exclusions/assumptions are clear

Proposed/agreed changes to terms are appropriately reflected in costs, schedules and responsibilities

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Risks are mitigated

Documented plan is executed

Test-it-first tactics

Active probing for problems versus just waiting for issues to come up

Avoiding issues is the norm

All-or-nothing tactics

Wait and see attitudes

ACTIONS

Risk management plan is fully implemented, maintained and supported

Risks are proactively sought in meetings and discussions and are dutifully identified, documented and assigned for follow-up

Risk tracking and reporting are appropriate and timely

Mitigations are effective

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Risk register - example

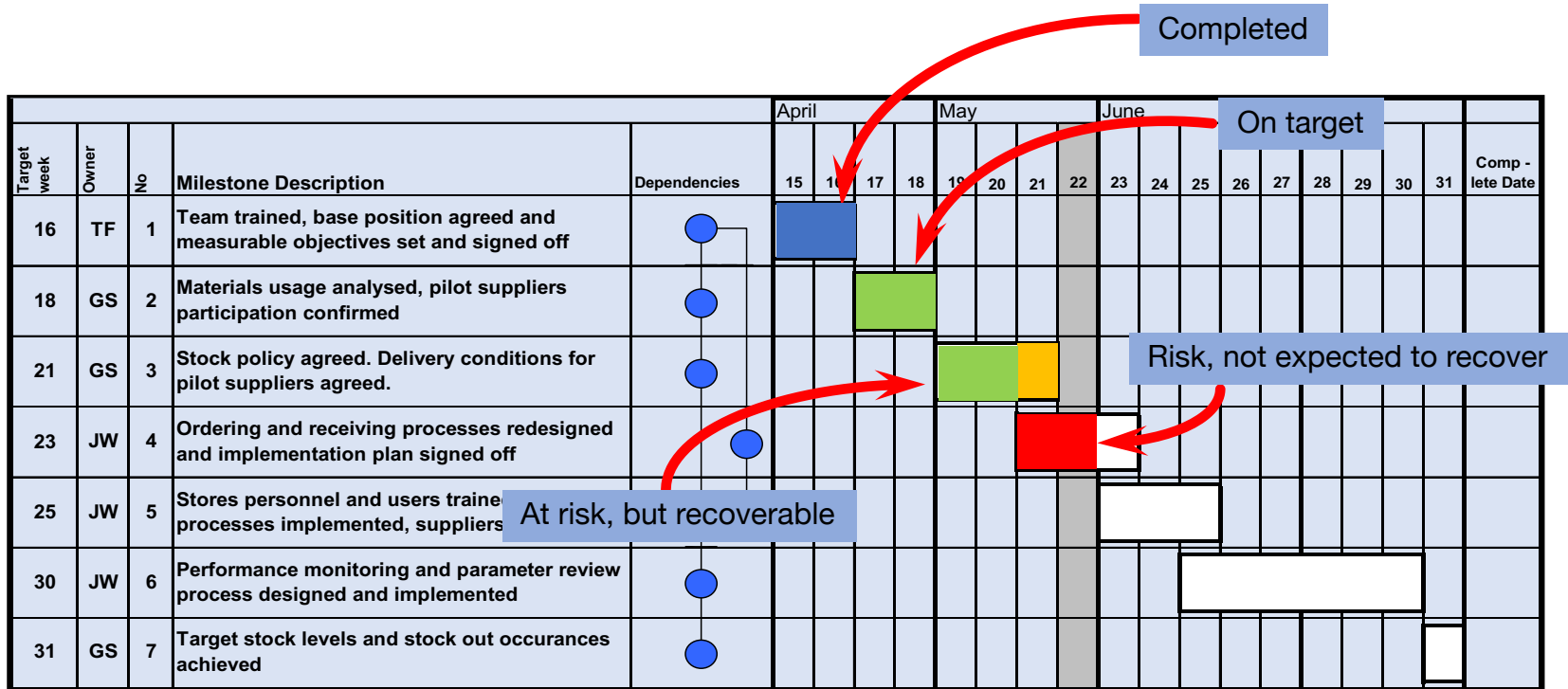|	Risk	Consequence	Prob-ability	Impact	Treatment of risk	Risk Owner	Action by	Residual probability
1	Engineering are late with defining component hardware.	Part sourced late, impacts on manufacturing launch & material ordering	H	H	Engineering to generate a committed Design & Definition plan which addresses high impact parts.	A Smith	11-Dec	
2	Supplier delivery performance continues to be in line with current performance (Average 25 days late).	May result in build line stopper.	M	M	???????????	B Jackson	1-Nov	
3	Poor quality of product particularly from recent problems with paint.	Non-conforming parts delivered and have to be returned - will result in build stop.	L	H	???????????	C Jones	15-Nov	
4								

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Risk matrix - example

	(Very High)	(High)	(Medium)	(Low)	(Very Low)
Significant delay or suspension of Programme Significant PR failure		• Not yet scoped traction power (25Kv) and level crossing changes. With NR lack of visible activity **(Keith)** • GA lack of ability to deliver some of the IT data and information that they require **(Steve M)** • Failure to agree necessary technical approach for both manufacturers (WiFi) **(Mike G)**	• Planning permission(s) delayed **(Keith)** • New Fleets compatibility with NR Gauging and traction power **(Steve D and Steve M)** • New timetables might need additional drivers – time to get and train **(Robert)**	• Works delayed due to approvals or unforeseen legacy asset issues **(Keith)**	
Delay of more than 2 weeks to key programme milestone Adverse press reports, or operational challenges	• GA procurement and recruitment process delaying NFP. **(Mike K)** • Maintenance handover risk **(Steve M)** • Failure to obtain a SaaS model from bombardier and Stadler; increasing IT costs **(Mike G)** • Over-running of Ilford engineering blockade, will impact ability to use it as operational depot **(Robert)**	• NR approvals take too long, delay depot works start **(Keith)** • Stabling challenges – If works delayed **(Martin)** • Performance risk associated with the introduction to service of four trains per week **(Robert)** • Potential revenue impacts around running a faster more robust timetable **(Mike Kean)** • Scarce assets due complexities of the cascade and dovetailing into other programmes? **(Natalia)**	• ECTS issue. Bombardier designed to only use their kit. **(Steve D)**	• Bombardier gearbox temperature monitoring, not possible due gearbox re-design; derogation application **(Steve D)**	
Delay of less than 2 weeks to key programme milestone	• Stadler have announced they are changing the factory for the Bi-mode 4 train. Delivery still secure, need to assure quality **(Steve M)**	• Failure to align technical approach between manufacturers, increasing complexity **(Mike Gray)**			
Slight delay to part of programme missed isolated milestone				• Diversion of resource away from Bombardier as it is not a 'new train'	
Minor impact, negligible to programme					

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Risk Heat Map
(Active risks)

Plan tracked actively

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Completed

On target

Risk, not expected to recover

At risk, but recoverable

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Team member benefits are realised

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People feel they are learning

Good press is being created

The right balance of emphasis on project benefits than project costs

Good staff want to leave the project

Negative remarks about doing the work

Staff overworking to catch up

ACTIONS

It is clear how the project will help the reputation of change agents in the business

It is clear how project will help team members' careers

Project is recognised for how it will contribute to the organisation's success

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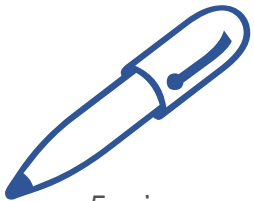
5 mins

- In groups

- Considering all we have discussed today, list some actions you could take in setting up the project to make it successful

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Daily and weekly meetings

- Daily stand up

- Weekly – performance to plan, risk escalation and interdependencies

- Weekly steering group - senior risk escalation, critical decisions

- Monthly programme board – Executive oversight

- Red review team

- Gold review team

Simple 'RAG' reporting

	Project U	Project X	Project Y	Project Z
Stakeholders have high commitment	🟩	🟩	🟥	🟩
Business benefits are realised	🟩	🟩	🟨	🟩
Work and schedule are predictable	🟩	🟨	🟨	🟥
Project team is high performing	🟩	🟨	🟨	🟩
Scope is realistic and managed	🟩	🟨	🟨	🟥
Risks are mitigated	🟩	🟥	🟨	🟨
Team member benefits are realised	🟩	🟩	🟩	🟩

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Weekly quad reporting (example)

UKSAR2G Workstream Affinity (Part-145) Updated 9 Jan (Howard)

Achievements last week

- Costed plans established for AFS and blended options
- Transition plan written to first draft for AFS (full) approach
- Meetings with stakeholder over maintenance strategy
- Discussions with EMB and others

Plan for this week

- Discussions and questions for GC of Affinity
- Agree maintenance strategy
- Finalise the transition plan based off that decision
- MIKE, do you need your costing sheet filled in?
- Transition plan for affinity

Dependencies / Help needed

- Need to check not double dipping numbers in the costing models esp. 145/CAMO
- Maintenance strategy decision

Key risks and issues

- Nil at present

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Decision making

"In any moment of decision, the best thing you can do is the right thing, the next best thing is the wrong thing, and the worst thing you can do is nothing."

Theodore Roosevelt

Decision making process

GATHER	
ANALYSIS	
TAKE	
EVALUATE AND COMMUNICATE	

Gather and Analyse - SWOT

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Let's imagine moving home – do you don't you?

Strengths	Weaknesses
• Will have more space of better area to live in	• Possible higher insurance
• Closer to train station so much less commuting	• New neighbours might not be as good as the last ones
• Better 'postcode' and much closer to our friends	• Removal costs, significant – is this just a need or a want?
Opportunities	**Threats**
• Newer house, so probably lower fuel bills and better economy	• Less available cash for holidays etc.
• The School looks very exciting, the head teacher is good, and the kids would like it more.	• The main road nearby is a worry

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Weighted 'pros v cons' analysis

Should I change my old car for a newer model?

Pros (for/advantages)	Score	Cons (against / disadvantages)	Score
Better comfort	3	Cost outlay will mean making sacrifices	5
Lower fuel costs	3	Higher insurance	3
Lower servicing costs	4	Time and hassle to chose and buy it	2
Better for family use	3	Disposal or sale of old car	2
Better reliability	5	Big decisions like this scare me	4
It's a load off my mind	2		
Total pros (6)	**20**	**Total cons (5)**	**16**

Taking the decision!

- Make the right decision, not the easy one

- Be clear in delivery and your expectation

- Communicate clearly what success looks like

- Be bold

- Be confident and take the decision

- Never delay a hard decision, it only gets harder

- Avoid emotional decision making – factual only!

- Gain support either explicit or implicit support

- Use colleagues to 'sound' ideas to if you are not sure

- **Do not procrastinate!!**

Reasons for poor decisions

- Laziness

- Not anticipating unexpected results

- Indecisiveness

- Remaining locked in the past

- Over-dependence

- Isolation

- Lack of technical depth

- Failure to communicate the what, where, when and how

•….Harvard Business School, 2015

Today's Signposts (day 2)

- Project initiations and communications

- Building the project team

- Stakeholder management

- Project governance

- Decision making

- Final Board report/presentation

- Post project review and exit

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Board reporting

- Acid test – what was the exam question, have you met that?

- Recap the scope statement

- Executive summary – key commercials, risks, returns etc

- Red review, gold review

- Success measures clear

- If presenting – credit team – always, not you!

Reporting – 'Business' English

- It isn't a story but it must flow and allow the reader to engage the topic

- Write in the third person always

- Keep sentences short

- Use appendices and annexes

- Use linking words such as however, therefore, for this reason – they help flow

- Be careful of punctuation and grammar usage

- Write the executive summary and table of contents last

- Focus on the objective

- Plan before you start

- Use a clear layout – or template if your company uses such

- Edit and proof read – several times

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Board presentation

25 mins prep
10 mins (each)

- In groups – prepare and present to your cohort your board presentation

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Post project evaluation

- After the project is finished and BEFORE you all disperse…

- With client/sponsor
    - How did 'we' do?
    - What did you like / dislike?
    - Was communication effective?
    - Did you feel in the picture?
    - Case study….
    - Success statement / quote

Post project evaluation

- After the project is finished and BEFORE you all disperse…

- With team

    - Highs and lows?

    - Comms within team

    - What worked and didn't – learning for next time

    - Team skills balance

    - What did they learn, have they captured in any log books etc.

- Keep a track of these conversations – in three weeks you will be busy on the next one!

Making the change stick!

- Change the processes
- Change the measurement, KPI
- Ensure incentives are tied to new model
- Have a refresh in a [year]
- External (independent) scorecard
- Continuous improvement

Behaviours!

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Learning outcomes (2)

Day 1 – The change set up

- Project initiation and communications

- Building the project team

- Stakeholder management

- Project governance

- Decision making

- Board reporting / presentation

- Post project review and exit

So that the manager can:

- Understands the key principles to succeed when initiating a project; and the importance of external communications planning and execution.

- Developing a team that has the skills and the dynamics to win

- Managing external stakeholders

- Keeping the risks of the project always managed, keeping the programme board align and appraised

- Introduction to evidence collection and decision-making steps

- Final presentation to the board

- The importance of exiting correctly and capturing the vital exit information – before it is too late.

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Leading Change in an Engineering Business

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