maxim
CONSULTING GROUP

Field Leadership Training

Project Planning &
Project Leadership

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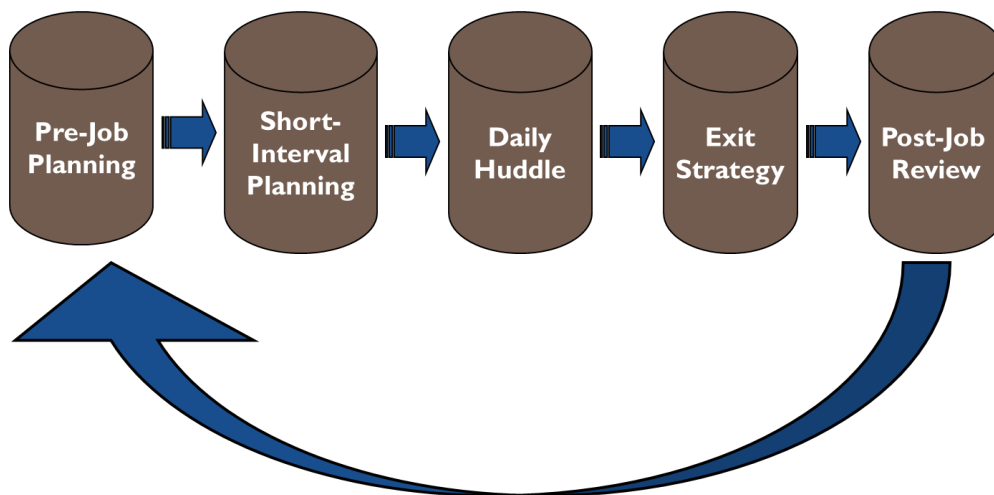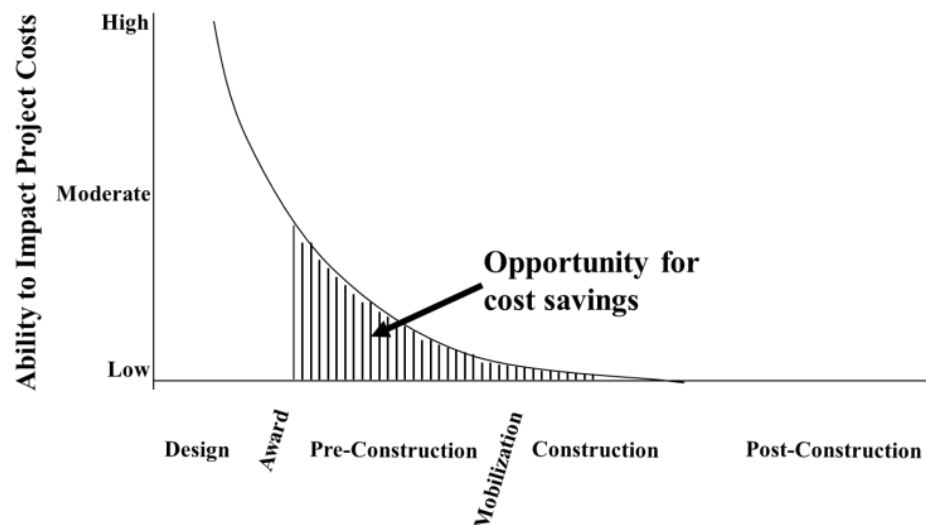# PROJECT PLANNING: FROM PRECONSTRUCTION TO CLOSEOUT

OBJECTIVES

- Understand the components of an effective prejob plan
- Discuss the power of a short interval plan
- Identify the results desired from a daily huddle
- Become familiar with the exit strategy process
- Discover the necessary feedback loop of the lessons learned meeting

PROJECT PLANNING

COST IMPACT ANALYSIS

PRE-JOB PLANNING PROCESS

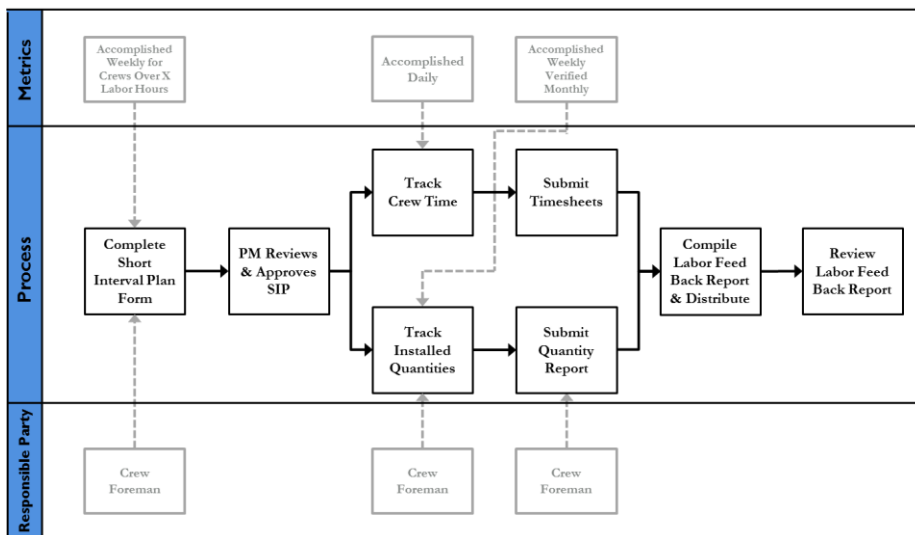| Metrics		Accomplished within 30 Days (Yes or No)	Accomplished within 30 Days (Yes or No)	Accomplished within 60 Days (Yes or No)	
Process	Project Award →	Estimating Turnover Process →	Planning Meeting Process →	Change Order Zero Process →	Construction Execution
Responsible Party		Lead Estimator	Project Manager	Project Manager	

PRE-JOB PLANNING

Prejob Planning Process

- Estimating Turnover Meeting
- Estimating Budget
- Planning Meeting
- Change Order Zero
- Operating Budget

SHORT INTERVAL PLAN

Short Interval Planning | Weekly Planner - Entry

| Home | Short Interval Planning | Time Entry | Quantity Tracking | Approval | Settings | Sign Out |

Weekly Planner - Entry

Weekly Planner - Review

Job Name: Z003 – FAU FOOTBALL STADIUM (w/ 6218)
Project Manager: SDW
For Week (1): 04/13/2012 | Week 1

Did you receive Job Cost Feedback last week? ☐
Did your PM call you to discuss your SIP? ☐
Cancel Changes

Show Activity for: Area | Cost Code | Show All

	Sat	Sun	Mon	Tue	Wed	Thu	Fri
Daily Shift Length:	0	0	8	8	8	8	8

Plan is Final? ☐
Save Plan

*	Cost Code	Description	Area	Materials Source	Materials Status	Tools Eqp	Production Rate Qty	Production Rate UM	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Production Target Qty	Production Target UM
☐	01-L1-01A	Install Conduit - Area 1	01				2.5	LF	0	0	3	3	3	0	0	180.0	LF
☐	01-L2-033B	Cabling - Area 1	01				4.0	LF	0	0	0	2	2	2	0	192.0	LF
		<== Add New ==>															

| Activity Plan | Alternate Work | Notes / Issues | Manpower Totals: | 0 | 0 | 3 | 5 | 5 | 2 | 0 |

SHORT-INTERVAL PLANNING TOOL- 1 WEEK LOOK AHEAD

Objective= Fill out by Wednesday noon and review with work crew. Fax to office by the end of the workday on Wednesday of each week.

Project Manager _____   Week Ending _____

PROJECT _____
FOREMAN _____

What work is planned and scheduled to be completed next week?	Manpower (Indicate how many people you will need on each day)							What materials & equipment are needed to complete planned work for next week?	Are materials on site?		Is this a "Repeat Request"?	
	Mon	Tues	Wed	Thurs	Fri	Sat	Sun		Yes	No	Yes	No
What alternate work is planned if scheduled work happens to fall through? (i.e. PLAN B WORK)												
Total manpower needed to complete next weeks work.												

Did you receive a follow-up phone call from your project manager discussing last week's 1 week look-ahead? ☐ YES ☐ NO

Did you discuss this with your crew before sending it in? ☐ YES ☐ NO

What subcontractors do you need next week?	
What issues need resolutions or answers? From whom do you need answers? When is it needed?	
What plans should we be making beyond the next week? Who should be planning? When will it be critical?	
Do you have any foremen working on your project next week? If so, please list them below and the expected durations.	

PRODUCTION TRACKING PROCESS

WHAT IS A FOREMAN'S DAILY HUDDLE

- Planning and communication process used by the best foremen
- Three to five minutes of planning and communication with your crew at the beginning and end of every day
- Involves your crew in the plan by getting ideas, input and suggestions
- Results in specific production goals or targets

DAILY HUDDLE

- Review SIP
- Set production targets
- Discuss alternate work plans
- Identify potential obstructions
- Identify potential costs/gains
- Review past performance

HOW DO CREWS START THEIR DAY?

- Are you frequently or always on site when your crew started their day?

  _____

- Is it important?

  _____

- Why?

  _____

Task Master: Assigns one task at a time
    <u>*Example:*</u>
        "You three guys go up to the 2nd floor and install the light fixtures, and when you are done, come see me."

500 Pound Gorilla: Tells the crew what to do, how to do it and how much to get done
    <u>*Example:*</u>
        "You three guys need to get the 10 remaining fixtures on the 2nd floor installed by 11:30 a.m., then get all of the piping to the generator completed by the end of the day."

Superstar: Tells the crew what to do and involves them in a discussion of how to do it and how much to do
    <u>*Example:*</u>
        "We need to install fixtures on the 2nd floor and run the generator piping."

- Do we have everything that we need?
- How long should each task take?
- How much should we be able to get completed by the end of the day?
- Does anyone have any questions or ideas?
- What would make this easier?
- Does anyone see any safety issues?

DAILY HUDDLE IDEAS

- Cue cards
- Dry erase boards
- White trucks
- In the job trailer
- Magnetic signs on gang boxes, etc.
- On a laptop or iPad

THE BENEFITS OF TEAMWORK

How many squares do **you** see?
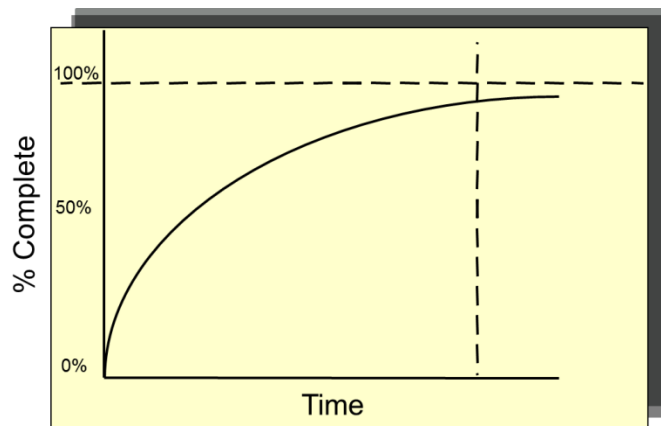
_____

How many squares does **your team** see?

_____

REAL TIME FEEDBACK
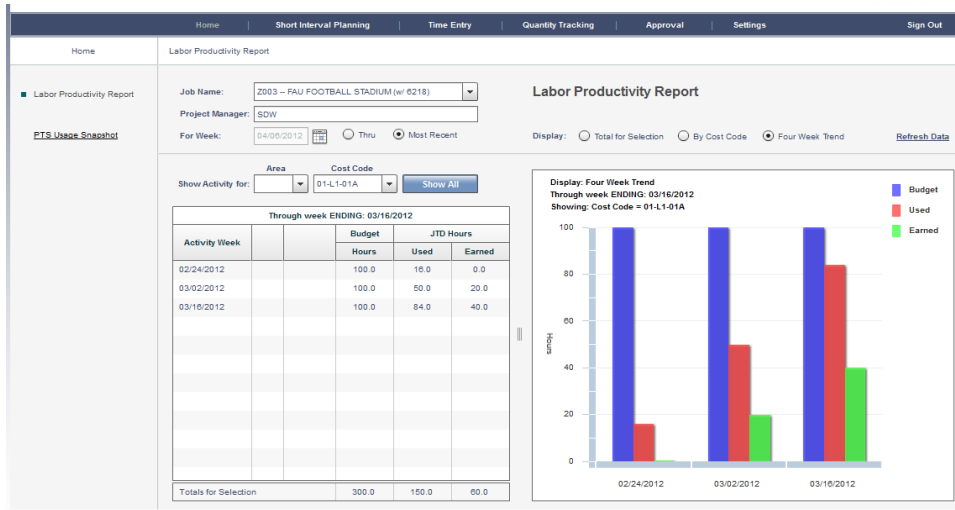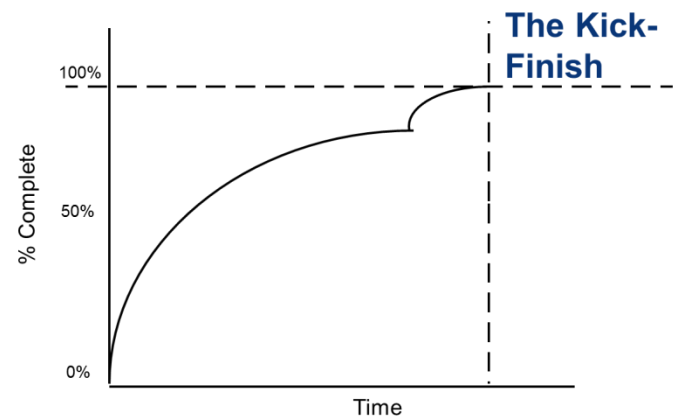
EXIT STRATEGY

WHAT PREVENTS US FROM COMPLETING PROJECTS 100%?

_____

_____

_____

_____

EXIT STRATEGY

- "Pre-job planning" for the end of the job
- Re-energize and refocus the team
- Identify critical issues and action plan the last components of the project

POST JOB REVIEW

What type of information do you want to know when you finish a project?

_____

_____

_____

- Conduct a review for a mix of projects – NOT just the bad ones
- Take the time to capture important cost information
- Share best practices (i.e., training, "lunch and learn," etc.)
- Focus on the controllable and influenceable
- Feedback to estimating with accurate turnout data

SUMMARY & CLOSING POINTS

- Planning is key to improved profitability and ability to sustain downturn
- Tracking productivity is necessary to measure improvement
- Use planning tools to drive productivity

SELECT ONE PERSONAL PRODUCTIVITY HABIT TO CHANGE

1. Old habit:

   _____

2. New habit:

   _____

3. Initial steps to implement:

   _____

   _____

   _____

4. Who will help:

   _____

5. How will they help:

   _____

   _____

6. Identify a check-point for yourself to see how you are doing with this new habit:

   _____

PROJECT LEADERSHIP: HOW LEADERSHIP DIFFERS FROM MANAGEMENT

MODULE OBJECTIVES

- We will explore the differences in management and leadership
- We will examine the balance of management and leadership required by a project manager
- We will introduce a model of effective leadership

STARTER QUESTIONS

Define Leadership

_____

_____

Who are some examples of great leaders?

_____

_____

MANAGEMENT AND LEADERSHIP: DEFINED BY BEHAVIORS

MANAGEMENT AND LEADERSHIP COMPARED

- *Management*
  - **P**lanning
  - **O**rganizing
  - **C**ontrolling

- *Leadership*
  - **S**etting Direction
  - **A**ligning Resources
  - **M**otivating and Inspiring

SETTING DIRECTION

- Tie to the big Picture
- Communicate "Why"

ALIGNING RESOURCES

- Provide Things
- Create Ownership
- Leverage Strengths

MOTIVATE AND INSPIRE

- Provide Encouragement
- Understand People
- Know your people deeply

POC VS. SAM

- Which of these activities should get more time?

  _____

  _____

- Which is most important?

  _____

  _____

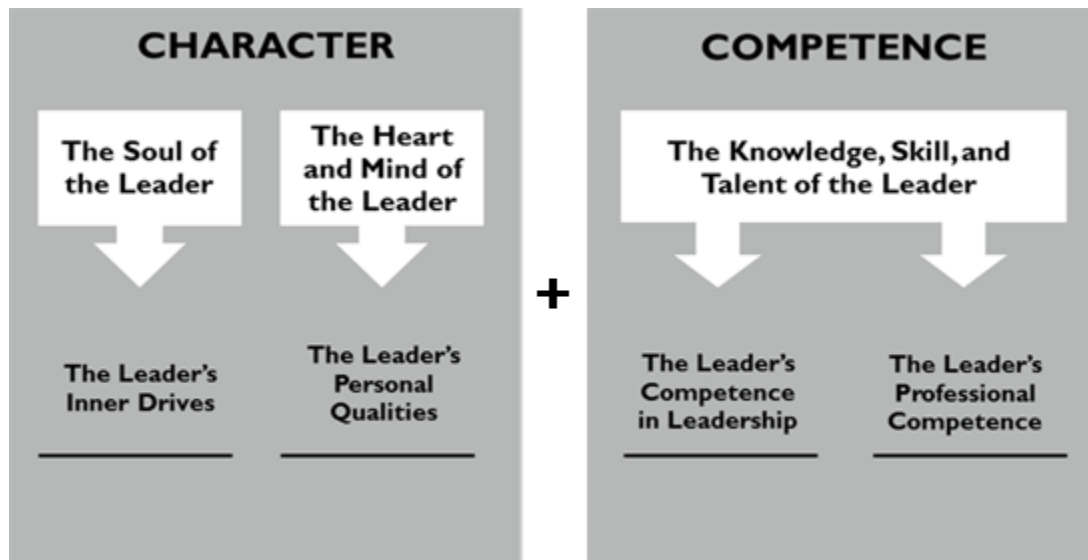- Which activity is more lacking in the projects you have experienced?

  _____
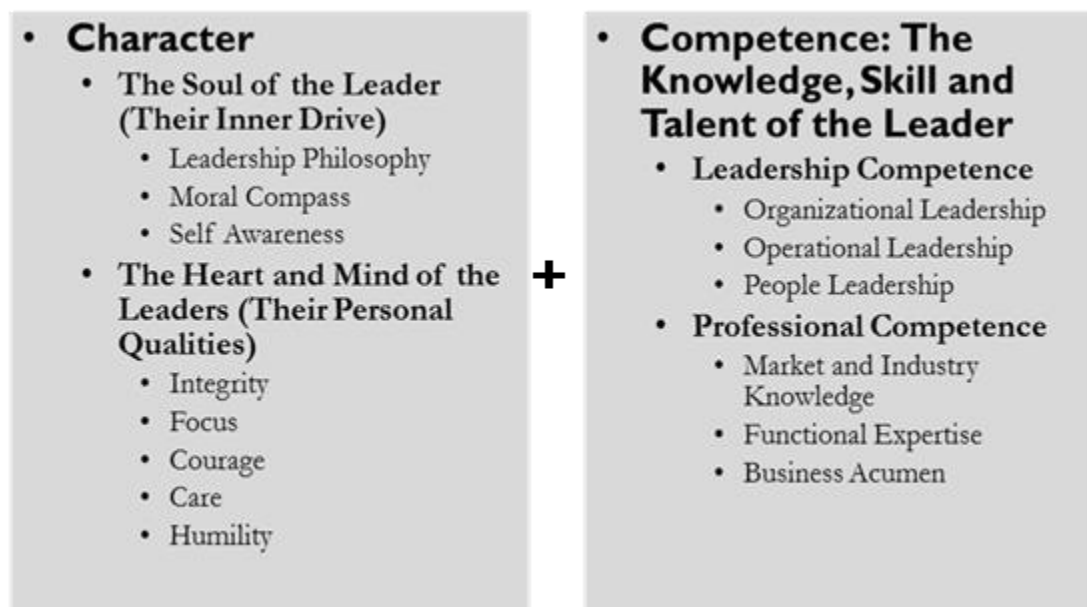
  _____

POC AND SAM: EFFECTIVE PROJECT LEADERS DO BOTH

P		S	
O		A	
C		M	

GREAT LEADERSHIP

ANATOMY OF LEADERSHIP

CHARACTER

The Soul of the Leader

The Heart and Mind of the Leader

The Leader's Inner Drives

The Leader's Personal Qualities

+

COMPETENCE

The Knowledge, Skill, and Talent of the Leader

The Leader's Competence in Leadership

The Leader's Professional Competence

OUR BASIC LEADERSHIP MODEL

- **Character**
  - The Soul of the Leader (Their Inner Drive)
    - Leadership Philosophy
    - Moral Compass
    - Self Awareness
  - The Heart and Mind of the Leaders (Their Personal Qualities)
    - Integrity
    - Focus
    - Courage
    - Care
    - Humility

+

- **Competence: The Knowledge, Skill and Talent of the Leader**
  - Leadership Competence
    - Organizational Leadership
    - Operational Leadership
    - People Leadership
  - Professional Competence
    - Market and Industry Knowledge
    - Functional Expertise
    - Business Acumen

THE THREE DIMENSIONS OF LEADERSHIP

"YES, AND…"

- Speed is important
- Start each line with only "Yes, and…."
- Go around the group one time for each idea

- **What does this have to do with leadership?**

_____

_____

SELECT ONE PROJECT LEADERSHIP HABIT TO CHANGE

1. Old habit:

   _____

2. New habit:

   _____

3. Initial steps to implement:

   _____

   _____

4. Who will help:

   _____

5. How will they help:

   _____

   _____

6. Identify a check-point for yourself to see how you are doing with this new habit:

   _____

SPEAKER BIO