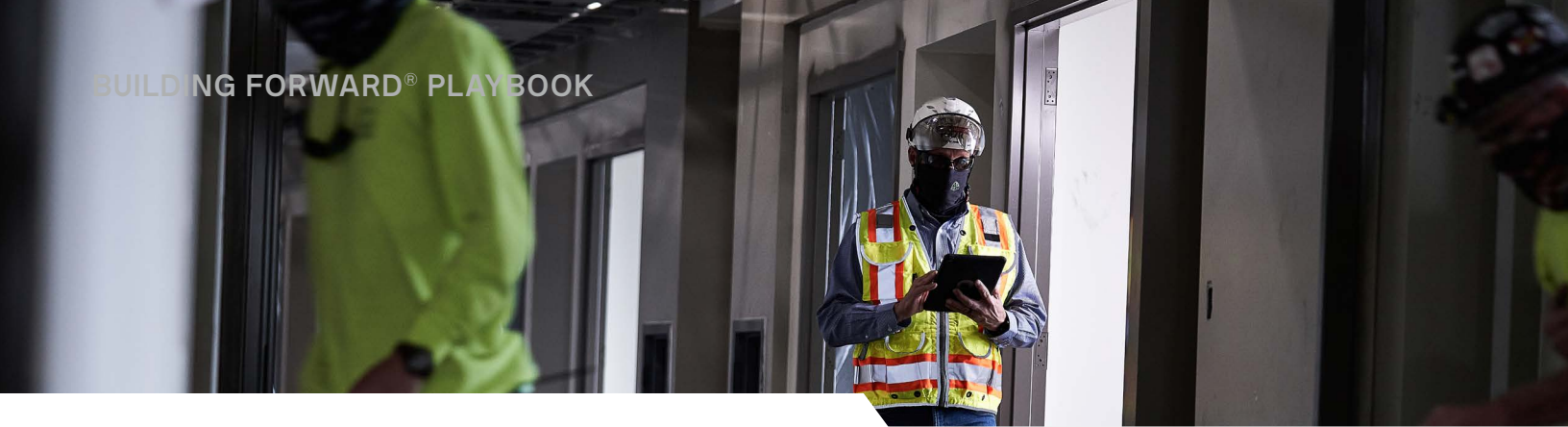




# PLAYBOOK

Proven resources and best practices for obtaining the benefits of Building Forward® for your team.

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# **BUILDING FORWARD®**

is Robins & Morton's approach to delivering exceptional results on every project.

When applied consistently, Building Forward® yields benefits to our teams that contribute to the success of our projects and initiatives.

Some benefits of implementing Building Forward® include:

- Team health
- Preferential response from trade contractors
- Improved team communication
- More effective onboarding
- Value-creating technology
- Improved quality
- Strengthened safety culture
- Better budgets earlier
- Consistent schedule accuracy

## Building Forward® Structure

**LEADERSHIP TEAM:** The purpose of the leadership team is to inspire and perpetuate the Building Forward® culture throughout Robins & Morton.

**CORE TEAM:** The core team supports the continued growth of Building Forward® and represents all divisions and departments. Members meet regularly and act as liaisons and facilitators for their respective divisions or departments.

**RESOURCE GROUPS:** Building Forward® resource groups provide support and develop resources for the tools and processes listed in this book.

**ADVOCATES:** Building Forward® Advocates facilitate assessments and tracking logs for their jobsite or department.

## THE TENETS OF BUILDING FORWARD®

### Collaboration

Collaboration is working with others to achieve **shared goals**.

### Continuous Improvement

A **never-ending effort** to expose and eliminate waste that will set in motion a culture that is tenacious about eliminating inefficiencies.

### Learning Culture

Using shared experience and knowledge, to challenge conventional thinking and develop new ways to measure success and achieve objectives. Embracing **learning breeds innovation**.

### Leadership Development

**Empowering people to improve** with a structured process to set goals, address concerns, and assess progress to ensure an optimal path for growth.

# Team Culture

**The goal of Building Forward is to create a positive and inclusive work environment where team members feel valued, respected, and motivated, leading to higher job satisfaction and better outcomes.**

A strong team culture promotes employee engagement, retention, and overall organizational success. Healthy teams are marked by shared values, attitudes, and behaviors that shape the working environment and interactions among team members, resulting in exceptional results for our people, partners, and clients.

Consistent use of Building Forward tools will foster mutual respect, open communication, collaboration, diversity, accountability, and a focus on professional development and work-life balance. These elements are integral to the success of any project, whether on the jobsite, within a department, or as part of collaborative efforts with external stakeholders.

All team members are responsible for their part in creating healthy teams, including:

### Executive Leadership

Senior executives and leaders are responsible for promoting and modeling a positive team culture. They should provide the necessary resources, support, and training to foster a healthy work environment. Senior leaders should regularly communicate the importance of team culture and monitor how it is reflected throughout the organization.

### Managers and Team Leaders

Managers and team leaders are essential in cultivating a positive team culture within their teams. They are responsible for addressing concerns related to behavior promptly and confidentially. Managers and team leaders should lead by example, promote open communication, encourage collaboration, and recognize the contributions of their team members.

### Team Members

All team members are responsible for upholding and contributing to a positive team culture. They should treat others respectfully, actively participate in team activities, and foster a collaborative and inclusive work environment. Team members should be encouraged to provide constructive feedback, share their knowledge and expertise, and support the professional growth of their colleagues.

## Procedure

1. Establish Conditions of Satisfaction.
2. Facilitate study action teams.
3. Conduct team culture training programs to educate team members on the importance of a positive work environment, respectful communication, and collaboration.
4. Provide professional development opportunities to enhance team members' skills, knowledge, and leadership capabilities.
5. Hold teambuilding activities.
  - a. Organize team-building activities, such as offsite retreats, team lunches, or team challenges, to strengthen relationships, promote collaboration, and enhance team dynamics.
6. Generate feedback mechanisms.
  - a. Implement feedback mechanisms, such as surveys, to gather input from team members regarding the team culture, areas for improvement, and suggestions for enhancing collaboration and engagement.
7. Foster work-life integration.
8. Implement performance management.
  - a. Integrate team culture considerations into the performance management process to ensure that behaviors aligned with a positive team culture are recognized and rewarded.

### BEST PRACTICES

- ✔ Focus on improving the health of the entire team including Robins & Morton team members, craft professionals, designers, client, etc.
- ✔ Promote a problem-solving attitude.
- ✔ Recognize individuals for their contributions.

# Commitments and Tracking

The [Building Forward® Power App](#) should be used to track the use of Building Forward® tools and processes; this will help you track your progress over time.

Access the app at the link above, or by visiting the Building Forward® page on HUB.

Each tool is self-assessed using the following scale:

<b>1 Aware</b>	My team understands expectations.
<b>2 Learning</b>	We have established measurable learning goals.
<b>3 Competent</b>	We are implementing to minimum standards/intent.
<b>4 Teaching/Innovative</b>	We've achieved sustained implementation of minimum standards/intent.
<b>5 Industry Leading</b>	We are changing the way we work and can provide examples of improvement.

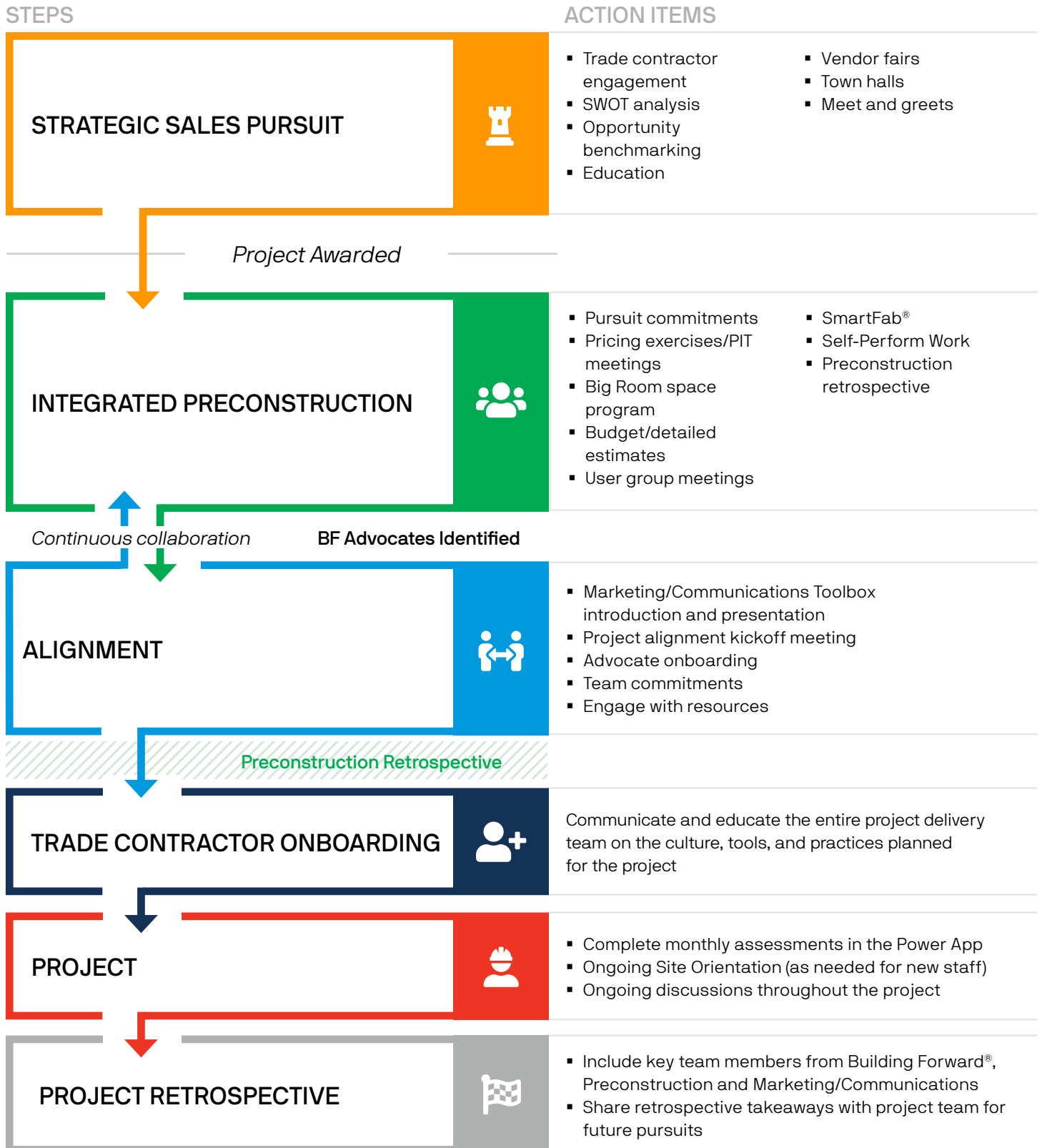
## Tracking Team Culture

Team culture is monitored during each Building Forward® assessment using the following scale:

<b>Resistant</b>	<b>Disengaged</b>	<b>Compliant</b>	<b>Engaged</b>	<b>Enthusiastic</b>

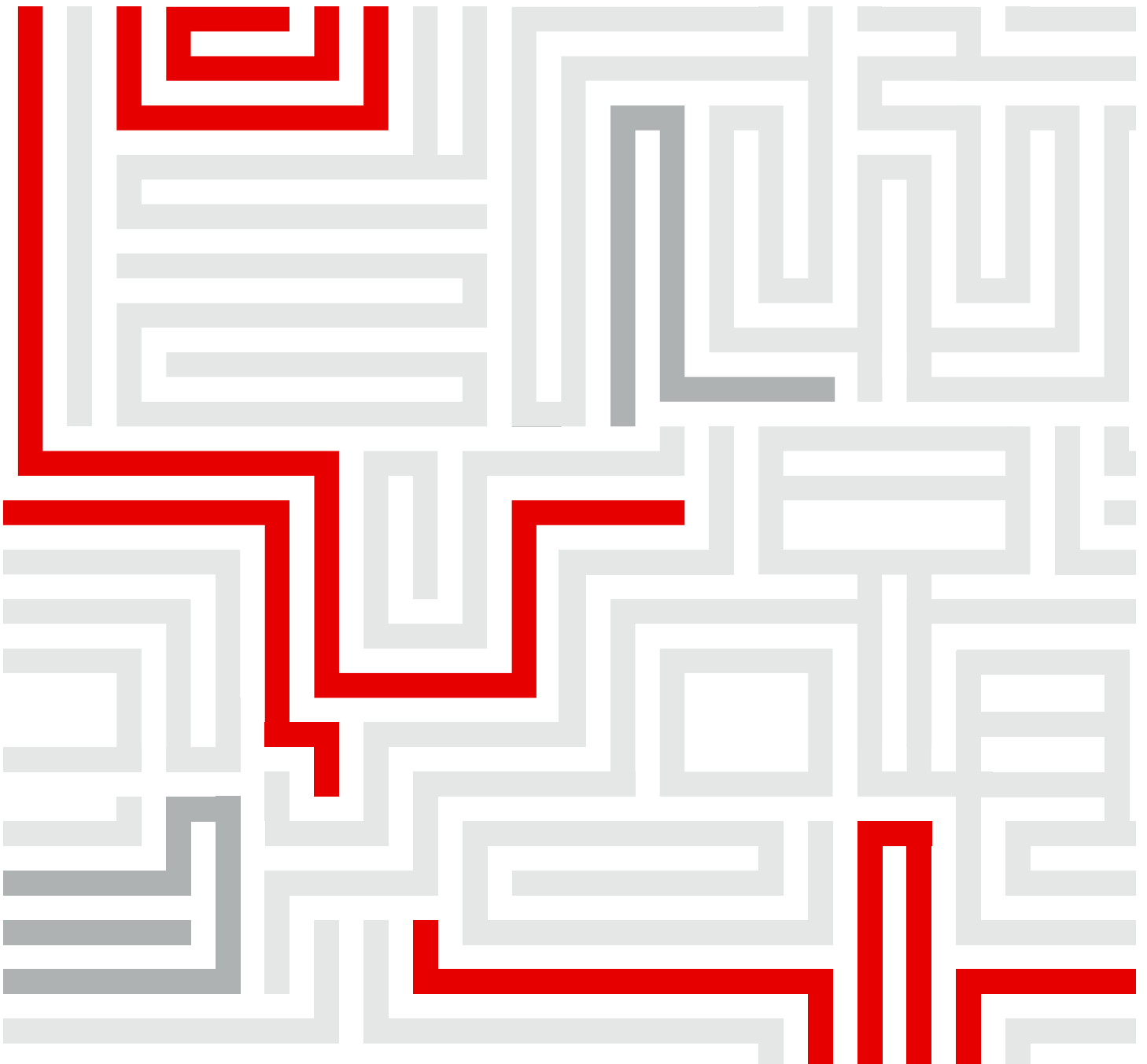
Learn more about team culture on page 3.

# Implementation Process





# Tools and Processes



# Alignment

**DEFINITION:** A process to establish a clear understanding of goals and responsibilities among all team members.

**PURPOSE:** To ensure the entire team is working towards the same objectives so that their efforts produce the best possible results.

**RESPONSIBILITY:** The project executive (project director, operations manager, senior preconstruction manager) should facilitate the initial alignment meeting with participation of the entire management team.

**FREQUENCY:** An initial alignment session should be held with the Robins & Morton project leadership to confirm strategy for project execution and processes to be implemented. A subsequent alignment session should include project leadership from the client, architect, Robins & Morton, major trade contractors, and consultants as applicable.

## Procedure

### Internal Alignment Meeting

1. Coordinate a meeting with the project executive, preconstruction leader, superintendent, and project manager.
2. Review the Building Forward® tool list and identify specific tools to be implemented on the project. Also discuss the level of implementation to be achieved.
3. Identify a Building Forward Advocate for the project.
4. Identify additional training that may be required to properly execute the Building Forward strategy effectively.

### External (OAC) Alignment Meeting

1. Coordinate a meeting with the client, designer, major trade contractors, and consultants as applicable.
2. Discuss project protocols, meeting structure, preconstruction approach (e.g., Project Implementations Teams), and project execution strategy.
3. Develop the Conditions of Satisfaction.

### BEST PRACTICES

- ✔ Send agenda ahead of time.
- ✔ Include operations and preconstruction team in both internal and external meetings.
- ✔ Encourage the client and designer to lead a portion of the meeting.
- ✔ Seek to understand value as described by the client.
- ✔ Focus on building relationships.

# Co-location

**DEFINITION:** Centrally locating all project stakeholders together in a jobsite office to participate in the delivery of the project.

**PURPOSE:** To create a collaborative environment that is efficient, organized, and inclusive.

**RESPONSIBILITY:** This process should be facilitated by the Robins & Morton project manager and include participation from all Robins & Morton management, trade contractors, clients, and designers.

**FREQUENCY:** Continuous co-location is preferred; however, some teams may schedule Big Room sessions that occur weekly, bi-weekly, or monthly depending on the project team.

## Procedure

1. Develop a co-location plan starting with a space program.
2. Locate a facility that will accommodate the needed space (office trailer, existing building, etc.)
3. Design a layout.
4. Include funding for co-location in the estimate. Deduct cost included for office trailer from trade contractor office trailers to maximize funding.
5. Define and communicate participation expectations.
6. Install the co-location.

## Sample Subcontract Language for Schedule A

To ensure a collaborative project delivery, a co-located project office is available to trade contractors the planning, coordination, and management of the project. Participation is a requirement and a representative from your firm will participate leading up to, and during the performance of this scope of work. This person must be authorized to make commitments on behalf of this contractor.

### BEST PRACTICES

- ✓ Open floorplans promote communication.
- ✓ Engage JET to ensure the IT infrastructure will support your intended use.
- ✓ Dedicate an area for OAC stand-up meetings.
- ✓ Dedicate an area for project dashboards.
- ✓ Include flexible huddle rooms to facilitate small meetings.
- ✓ Include a large meeting space.

# Conditions of Satisfaction

**DEFINITION:** A list of criteria that must be achieved for the project to be deemed a success.

**PURPOSE:** To gain a thorough understanding of the client's objectives so that all team members can align to accomplish those objectives. The Conditions of Satisfaction (CoS) will guide the team members as they design, plan, and execute the project.

**RESPONSIBILITY:** The operations manager will identify a leader to facilitate the development of the initial CoS. The project manager is responsible for reviewing the CoS throughout the project to ensure that the objectives are being achieved.

**FREQUENCY:** The initial work session to develop the CoS should occur during the alignment meeting, and the CoS should be reviewed monthly with project participants throughout the duration of the project.

## Procedure

1. Schedule an alignment meeting and introduce the CoS process.
2. Conduct a work session during the initial alignment meeting to gather COS input from all stakeholders.
3. Prepare a draft CoS for the project team to review.
4. Post the CoS in a prominent location at the project site.
5. Review the CoS with team members monthly.
6. Update the CoS periodically if there are significant changes in project participants or objectives.

## BEST PRACTICES

- ✔ Review the CoS during onboarding.
- ✔ Discuss with project team monthly. Identify actions to ensure conditions are being achieved.
- ✔ Identify items beyond contractual terms.
- ✔ Seek to understand why the project is being built.

# Integrated Preconstruction

**DEFINITION:** A strategic approach in which the onsite project team serves as an integral part of the preconstruction management team, optimizing successful project delivery with comprehensive control of costs, quality and schedule. Integrated Preconstruction is a method to leverage collaboration and engagement.

**PURPOSE:** To establish a thriving culture with the integration of operations staff during preconstruction, ensuring intrinsic and seamless performance for the duration of a project. This approach yields improved schedule and budget accuracy and more effective trade contractor selection. It affords the operations team time to acquaint themselves with the project, the project team, designers, and clients. The information generated by our operations team, such as schedules and logistics, can be promptly shared with trade contractors, designers, and clients. Proactive communication eliminates surprises before and during construction.

**RESPONSIBILITY:** The Preconstruction team is responsible for coordinating the operations team, trade contractors, design team, and client. The operations team will perform site logistics, develop the schedule, review the plans for constructability, and participate in preconstruction OAC meetings.

**FREQUENCY:** Integrated preconstruction is a continuous process which removes the concept of a defined Preconstruction start and stop. Set up frequent check-ins and preconstruction OAC meetings to keep all team members updated on the progress.

## Procedure

1. Coordinate internal responsibilities
2. Establish frequency of meetings (internal and external)
3. Establish a schedule for preconstruction and construction.
  - a. Early bid packages
  - b. Early trade contractors
  - c. Early procurement to meet the schedule.
4. Engage departments and managers of critical components
  - a. SPW
  - b. Early packages
  - c. Early trade contractors
  - d. SmartFab®
  - e. LEED
  - f. VDC
  - g. Safety
  - h. Marketing and Communications
  - i. Prequalification
  - j. Finance
5. Develop bid packages and scope contracts
6. Perform a constructability review
7. Develop estimates and estimate presentations
8. Assist with design development process via RFIs
9. Conduct retrospective meetings

### BEST PRACTICES

- ✔ Get buy-in from senior leadership.
- ✔ Coordinate schedule with Operations team while on other jobs.
- ✔ Prioritize team building.
- ✔ Be transparent with costs and schedule.

### RELATED POLICIES

- 📄 OP-030 Precon Services Kickoff Meeting Intracompany

# Craft Professional Onboarding

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**DEFINITION:** An initial introduction to the project for all craft professionals.

**PURPOSE:** To ensure craft professionals are aware of the project mission and CoS, understand how their contributions help achieve project objectives, and recognize that they are respected and valued as part of the Robins & Morton team. Convey site-specific expectations, including team culture, safety, quality, project mission, and CoS.

**RESPONSIBILITY:** The superintendent should facilitate this onboarding and engage other Robins & Morton managers to participate.

**FREQUENCY:** Onboarding sessions should be offered such that every craft professional is able to attend within the first week of working on the project.

## Procedure

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1. Develop a site-specific onboarding agenda including, but not limited to: site logistics, expected behaviors, safety expectations, quality expectations, and review of CoS.
2. Schedule the onboarding session at weekly intervals to ensure every individual is able to attend within the first week of working on the project.
3. Ensure that all salaried managers are familiar with the onboarding content and capable of facilitating a session.
4. Deliver onboarding sessions consistently as new individuals begin working on the project.

# Trade Contractor Onboarding

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**DEFINITION:** An initial introduction to the project for all trade contractor leadership.

**PURPOSE:** To ensure trade contractors are aware of the project mission and CoS, understand how their contributions help achieve project objectives, and recognize that they are a respected and valued part of the Robins & Morton team. Convey site-specific expectations, including team culture, behaviors, co-location, management systems, meeting structure, project mission, and CoS.

**RESPONSIBILITY:** The project manager should facilitate this onboarding and engage other Robins & Morton managers (superintendent and assistant superintendents) as appropriate.

**FREQUENCY:** The trade contractor onboarding session should take place before or during the subcontract signing process.

## Procedure

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1. Develop a site-specific onboarding agenda that conveys the team culture and project goals. Agenda should include, but is not limited to: site logistics, management systems, meeting structure, safety expectations, quality expectations, and Conditions of Satisfaction.
2. Distribute an agenda and establish a time for all appropriate leadership to attend. At minimum, attendance should include trade contractor, superintendent, project manager, and executive.
3. Conduct onboarding and note any follow-up actions.
4. Resolve open actions, address them in the subcontract language, and route the subcontract for execution.

# Field Planning at the Source

**DEFINITION:** Visual tools, publicly displayed in shared meeting spaces, are used for collaboration, planning, and tracking. Items include whiteboards, dashboards, process maps, schedules, tracking forms, and checklists. Large electronic displays on wall monitors offer another option to convey information.

**PURPOSE:** To build relationships among the field managers and accountability through effective planning and coordination.

**RESPONSIBILITY:** This process is facilitated by the Robins & Morton area manager with the support of the superintendent. Others can rotate in the facilitation; however, the area manager is responsible for the quality of the information and data gathering.

**FREQUENCY:** This meeting should occur daily and last no more than 15 minutes.

## Procedure

1. Develop an overall project schedule (OPS) identifying key milestones throughout the project.
2. Prepare near-term schedules (NTS) utilizing activity/duration/crew size/productivity (ADCP) worksheets provided by trade contractors.
3. Populate Weekly Work Plan (WWP) boards prior to the first meeting each week with activities shown on the NTS, including planned workforce for each activity for the week.
4. Update and assess progress, including workforce, each day during a daily stand-up meeting.
5. Assess the results at the end of each week, documenting Percent Plan Complete (PPC) and Reasons for Plan Failure.

## Sample Subcontract Language for Schedule A

Subcontractor agrees to participate in our Planning at the Source/LPS® process and will participate in a daily stand-up meeting at a time/location to be determined. Subcontractor will be required to plan all work activities on a weekly basis in accordance with the near-term schedule, including workforce and productivity where applicable.

### BEST PRACTICES

- ✔ Measure PPC as team performance, not individual company performance.
- ✔ Encourage trades to coordinate with each other.
- ✔ Identify project constraints on a constraint log.
- ✔ Identify specific safety concerns related to the work.
- ✔ Resolve plan failures as soon as they are identified.
- ✔ Keep meetings short/concise.
- ✔ Start meetings on time and require attendance.
- ✔ Encourage/require trade contractors to provide input and own their information.

### RELATED POLICIES

- 📄 OPS Near Term

# OAC Planning at the Source

**DEFINITION:** A system for project production that promotes the creation of predictable workflow among various disciplines so that it achieves reliable results and identifies reasons for plan failure.

**PURPOSE:** To build relationships among the client, designer, and contractor, and create accountability through effective planning and coordination.

**RESPONSIBILITY:** This process is facilitated by the Robins & Morton project manager with the support of the superintendent. Others can rotate in the facilitation; however, the project manager is responsible for the quality of the commitments and data gathering.

**FREQUENCY:** This meeting should occur daily and last no more than 15 minutes. It may be held virtually if the client and designers are not local. Participants should be expected to populate their WWP prior to the first meeting of the week and update the status of each activity daily.

## Procedure

1. Establish a consistent meeting time/location.
2. Populate Weekly Work Plan (WWP) boards before the first meeting each week with commitments for the week and identify a responsible person.
3. Update and assess progress each day during a daily stand-up meeting.
4. Assess the results at the end of each week, documenting Percent Plan Complete (PPC) and Reasons for Plan Failure.
5. Identify potential or active constraints and document them on a Constraint Log.

## BEST PRACTICES

- ✔ Measure PPC as team performance and not individual company.
- ✔ Display the board in a highly visible location to create transparency.
- ✔ Identify project constraints on a Constraint Board.
- ✔ Add a “parking lot” for items that are over a week out but will need to be addressed.
- ✔ Deal with plan failures as soon as they are identified.
- ✔ Keep meetings short/concise.
- ✔ Start meetings on time and require attendance.
- ✔ Ensure the meetings are efficient and productive.

# Project Marketing Plan

**DEFINITION:** A plan for promoting a project on internal company channels like The Framework and Viva Engage (formerly Yammer), and externally via platforms such as our company blog, social media, and various business and trade publications. It can include success stories, innovations, and milestones.

**PURPOSE:** To share knowledge about the project internally and to increase Robins & Morton's external visibility by providing content for sales collateral and awards and for fostering community pride in our projects.

**RESPONSIBILITY:** Onsite project leaders and the Marketing and Communications team collaboratively develop customized plans based on their individual project goals. Regular communication and two-way information exchange are vital for successful implementation.

**FREQUENCY:** Continuous from preconstruction to closeout. The Marketing team member should actively participate in project alignment sessions to educate the project team on their role as a valuable project partner.

## Procedure

### 1. Project Alignment Meeting

Designated Marketing team member participates in the project alignment session and begins educating the team on Marketing and Communications resources.

### 2. Marketing Plan KickOff Meeting

The team collectively establishes the project-specific marketing and communications plan, the meeting cadence moving forward, and any specific goals the team would like to accomplish. Meeting attendees include the onsite project team, Marketing team member, and any other project team members that want to provide input (including client representatives, design partners, or other key project partners).

### 3. Regular Check-ins

Throughout the project, the team should meet regularly to discuss the project's progress, any new marketing, communications or branding topics, and the ways to promote or share new items. The team should also discuss any previous items and necessary follow-up.

## Examples of Project Marketing/Project Communication

- Viva Engage posts
- The Framework stories
- Newscorner stories (including Giving With Purpose events, project milestone shares, etc.)
- Social media content (Facebook, LinkedIn, Instagram)
- Company blog thought leadership or project coverage
- Trade publication coverage (ENR, Modern Healthcare, Healthcare Design & Construction)
- Regional business publications (business journals and other local/regional media outlets)
- RFP or presentation case studies, including project facts and figures
- Project-specific windscreen or signage

## BEST PRACTICES

- ✔ Invite your designated Marketing team member to participate in your initial alignment meeting to begin collaboration early.
- ✔ Engage the entire team to develop the plan and be a part of the regular check-ins.
- ✔ Engage marketing as part of the project team by including them in applicable meetings and events, and openly sharing information.
- ✔ It may be valuable for the Marketing team member to engage the Communications team for some items to determine how information can be best used.
- ✔ Engage client's marketing group for additional opportunities to promote the project and Robins & Morton.

# Quality at the Source (QaS)

**DEFINITION:** The Robins & Morton Quality Assurance/Quality Control program that places emphasis on trade contractor installation quality and cultural buy-in. QaS engages the client, design team, consultants, Authorities Having Jurisdiction (AHJ), and other third-party inspectors to ensure that the individual installing the work understands the quality expectations prior to installation.

**PURPOSE:** To proactively focus on installing the work correctly and reducing the need to perform rework to correct deficiencies.

**RESPONSIBILITY:** The superintendent is responsible for developing a site-specific quality management plan, facilitating QaS meetings, conducting first-run studies, and ensuring all defects are resolved.




**FREQUENCY:** QaS starts during preconstruction and must be managed throughout the project. Every definable feature of work should have its own checklist, first-run study, and periodic review to ensure that quality expectations are met.

## Procedure

1. Develop a site-specific quality management plan.
2. Identify quality champion(s) to lead the QaS initiative for their scope of work (e.g., structure, building envelope, build out, etc.)
3. Identify Definable Features of Work (DFoW) and develop an installation checklist incorporating all requirements identified in the contract documents and manufacturers' requirements.
4. Conduct a preinstallation meeting led by the foreman with all craft professionals, designer/consultant, AHJ, and client. Review all quality standards and checklists related to the DFoW.
5. Install a sample of the work and inspect to ensure quality standards are met. Correct any identified issues.
6. Repeat the installation and verification process continually to ensure that quality standards are being maintained.

## BEST PRACTICES

- ✔ Involve third-party testing agencies in the process.
- ✔ Create installation checklists in Procore to facilitate comprehensive documentation.
- ✔ Engage designers/consultants to contribute to installation checklists.
- ✔ Trade contractors should prepare their own installation checklist and submit it to Robins & Morton for review.
- ✔ Include language in the Subcontract Schedule A outlining expectations regarding QaS.

 <p><b>QUALITY CONTROL</b></p> <p><b>WHO'S RESPONSIBLE</b></p> <ul style="list-style-type: none"> <li>Contractor</li> </ul> <p><b>HOW IT WORKS</b></p> <p>Quality control places the attention and physical inspections <b>after</b> work is put in place. This ultimately results in re-work and waste.</p>	 <p><b>QUALITY ASSURANCE</b></p> <p><b>WHO'S RESPONSIBLE</b></p> <ul style="list-style-type: none"> <li>Contractor</li> <li>Client</li> <li>Design Team</li> </ul> <p><b>HOW IT WORKS</b></p> <p>Quality assurance takes a proactive approach by educating and aligning the team around a plan to ensure quality is achieved <b>before</b> work is put in place.</p>	 <p><b>QUALITY AT THE SOURCE</b></p> <p><b>WHO'S RESPONSIBLE</b></p> <ul style="list-style-type: none"> <li>Robins &amp; Morton</li> <li>Client</li> <li>Design Team</li> <li>Trade Contractors</li> <li>Consultants</li> <li>AHJs</li> <li>Third Party Inspectors</li> </ul> <p><b>HOW IT WORKS</b></p> <p>Quality at the Source takes a collaborative approach to quality management involving all stakeholders, including the craft workers that are responsible for putting the work in place. This ensures buy-in from all team members and validates our quality assurance approach while reducing our quality control re-work and ultimately reducing waste.</p>
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# Site Walks

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**DEFINITION:** A routine walk of the project focused on identifying improvement opportunities.

**PURPOSE:** To collaboratively identify opportunities to improve the project by eliminating waste and enhancing safety, quality, and production.

**RESPONSIBILITY:** This process should be facilitated by the Robins & Morton area manager with the support of the superintendent and should engage trade contractors.

**FREQUENCY:** These walks should occur weekly.

## Procedure

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1. Identify a facilitator for the walk and establish a time.
2. Assemble the attendees (area trade contractors).
3. Explain the process and the purpose.
4. Document the opportunities for improvement and assign a champion to resolve.
5. Track the progress and confirm items are addressed.

## BEST PRACTICES

- ✔ Engage those closest to the work.
- ✔ Focus on quality assurance, not punchlist.
- ✔ Document the progress.
- ✔ Assess the logistics.
- ✔ Study the eight wastes of Lean.
- ✔ Don't just identify problems, develop solutions.

# Study Action Teams

**DEFINITION:** A process by which team members choose a topic and relevant material (books, videos, etc.), review independently, then gather to discuss their perspectives and implement actions that will improve their project or department.

**PURPOSE:** To reinforce team culture and create a learning environment by sharing perspectives. Group discussions encourage innovative thinking and identify holistic improvement opportunities.

**RESPONSIBILITY:** The project manager or superintendent should promote the use of study action teams and encourage team members to facilitate groups on relevant topics.

**FREQUENCY:** A monthly cadence works well, but this can vary significantly depending on the project team and their capacity.

## Procedure

1. Identify a champion to lead a study action team. Discuss a topic and type of media that will be beneficial to the team.
2. Participants review the material individually and identify their takeaways and ideas on how to improve current processes.
3. Establish a time for the participants to gather and share their takeaways and improvement ideas.
4. Identify specific actions and a champion to lead the implementation of each action.
5. Regroup to discuss the impact of the change and make necessary adjustments.
6. Identify the next topic and repeat.

## BEST PRACTICES

- ✔ Use different types of materials: books, videos, articles, etc.
- ✔ Require that participants come prepared.
- ✔ Participation should be encouraged, but optional.
- ✔ There should be no hierarchy during the discussion. Everyone's perspective is equally important.
- ✔ Invite project team members external to Robins & Morton.
- ✔ Rotate who facilitates each study topic.

# Technology Strategy

**DEFINITION:** An outline of the technology needed on a project and its intended purpose.

**PURPOSE:** To ensure appropriate technologies are identified and covered in the budget, and that individuals are trained on usage prior to the start of work.

**RESPONSIBILITY:** The project manager and superintendent should coordinate with JET and develop the overall technology plan.

**FREQUENCY:** This meeting should occur monthly for no more than 30 minutes.

## Procedure

1. List all project management functions that may require a technology solution.
2. Coordinate a meeting with JET, IT, VDC, and Innovation to identify appropriate technology solutions.
3. Obtain pricing/quotes so an adequate budget can be developed.
4. Fund the technology in the estimate.
5. Ensure that the staffing plan is adequate to administer the use of the technology. Participate in training if necessary.

## Examples of Technology Solutions to Consider:

- Procore
- Power BI
- Timberline/Sage
- P6
- Visio
- Bluebeam
- Computer Generated Imaging (CGI)
- Voyage Control
- Badging
- Virtual Reality
- Jobsite Security
- AutoCAD
- REVIT
- Navisworks
- Drone Imagery

## BEST PRACTICES

- ✔ Consider the value that each technology will add to the project.
- ✔ Don't rely on technology to replace critical thinking.
- ✔ Summarize the technology plan on an A3 for easy reference.
- ✔ Engage JET to assist with recommendations and installation of the infrastructure.
- ✔ Develop the plan early so it can be adequately funded in the estimate.
- ✔ Ensure the operations team is adequately trained to use the technology identified.
- ✔ Always engage IT to vet any new tech prior to implementing.

# Visual Management/Boards

**DEFINITION:** A tool that communicates information related to project performance/information.

**PURPOSE:** To provide transparency and drive improvement by communicating key project information to the entire project team in a common area.

**RESPONSIBILITY:** The project manager and superintendent should identify the information to be communicated visually and ensure that it adds value to the project.

**FREQUENCY:** This should be continuous throughout the life of the project from preconstruction to closeout.

## Procedure

1. Identify key performance indicators that are critical to project success.
2. Identify locations for information to be displayed.
3. Create dashboards/reports that communicate the key performance indicators.
4. Update dashboards frequently so information is current and reliable.
5. Use the reports to communicate project performance and identify areas that need improvement.

## Examples of Visual Management:

- RFI dashboard
- Submittal dashboard
- Material procurement status
- Progress billing payment trends
- OAC report
- Buyout status summary
- Project schedules
- Constraint boards
- Weekly Work Plans (WWP)
- Percent Plan Complete (PPC)
- Quarterly goals/Conditions of Satisfaction (CoS)
- Constraints

## BEST PRACTICES

- ✔ Engage the team to prepare dashboards related to their responsibilities.
- ✔ Use dashboards to communicate trends. This should show improvement over time.
- ✔ Celebrate the positive results.
- ✔ Make the information easy to interpret.
- ✔ Update the dashboards often.
- ✔ Display the dashboards in a prominent, easy-to-access location.