SEEING THE FOREST FOR THE TREES WITH NETPOINT®

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- **Experience:** 18 years

- **Industry Sectors:** Pharmaceutical, Private / Mixed-use Building Construction, Power Plant, and Aviation industries

- **Expertise:** Project Controls, Integrated Planning, Scheduling, Cost Estimating, and Construction Project Management.

- **Current Assignment:** Owner Representative Management Services for a CIP worth over $120M

- **Education:** BArch, Cornell University, 1996
1. Abstract Highlights
2. Premise
3. Common Occurrence
4. Application
5. Case Study
6. Takeaways
ABSTRACT HIGHLIGHTS

SEEING THE FOREST FOR THE TREES

PROPOSAL

A better way to ENGAGE, REGAIN and RETAIN stakeholders’ involvement during the hyper-dynamic project schedule management process.
Contractually specified scheduling software platform

1. Mandate
2. Compliance

Loss of a sensible (and possibly realistic) Plan within a Schedule

Innumerable cases where the software platform

- Invite, entice, and seduce a Planner to lose focus
- Develop schedule by “laundry-listing” and “lag-mining”
- Schedule trumps the Plan

Lag-mining:
1) forcing preferred dates by use of meaningless lags
2) reaction to unexplained lags found later
**ABSTRACT HIGHLIGHTS**

The Plan (the forest) is

» The collective and collaborative efforts of those who possess the expertise, the knowledge and the drive to successfully deliver on the project

When the Plan is no longer visible to stakeholders, Action MUST be taken, for the sake of the project

» A fresh and much-needed perspective
» Re-orient, re-calibrate and re-focus project efforts on what critically matters
Notwithstanding any recommendations, suggestions and/or solutions that may be implied here today...

The Project Schedule (Of Record), in its mandated software platform, WILL HAVE TO be maintained and updated!

Why? Because it’s a Contract Requirement
At the onset of a project, almost always, the team’s collective expertise, experience and knowledge is brought to bear in working through and developing a reasonable PLAN

A PLAN that is:

- Transparent
- Sensible & Plausible
- Clear & Direct

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COMMON OCCURRENCE

TEAM
Collaboration at its best

Insight
Purpose
Feedback
Drive
Buy-in
COMMON OCCURRENCE

Something begins diluting the team’s efforts / vision / PLAN

Freedom experienced in a common setting & language is suddenly taken away

Deliberately or not, the “thing” that enslaves the team’s PLAN is often the mandated software platform for scheduling
COMMON OCCURRENCE

It takes little to no time at all, unfortunately, for that same Plan to become so...

- Unwieldy
- Unmanageable
- Unintelligible
- Unrecognizable

... to the point that no one recognizes it as their own
How and why does the Plan get obfuscated within the Schedule?

No one meant for it to happen! But it did (and the practice continues)

- Blurred & complicated picture
- Excessive level of detail
- Reliance on complex scheduling tools & techniques
"You can have brilliant ideas, but if you can't get them across, your ideas won't get you anywhere."

– Lee Iacocca
WE thought WE knew where WE were headed!

WE believed that WE would be able to execute based on the Plan WE worked on!

Now, WE can’t make sense of this!
COMMON OCCURRENCE

How's your project coming along?

It's a steaming pile of failure.

It's like fifteen drunken monkeys with a jigsaw puzzle.

How's your project coming along?

Fine.
It seems like all of the information and logic is here, but we’re…

Complexity is often associated with failure simply because confusion prevails!
For those who came to hear about project planning and scheduling, I’ll get to the relevant management gems!

We’ve all experienced

» Interactive Planning Sessions
» Full-Wall Planning Workshops
» Schedule Development Charrettes
Now, imagine yourselves at the very end of one of those planning sessions.

**Do you see yourself looking at the wall and thinking**

*Why couldn’t we simply scan the info on this entire wall and make it live?*

*Wow! that’s a lot of information, but it makes sense!*

*I hope that whoever is responsible for “digitalizing” this understands what I meant.*
I’ll tell you what I notice

- Accomplishment
- Sensibility
- Trust
- Drive

All about to be clouded by

- Concern
- Skepticism
- Disassociation
What is it that we are all demanding and expecting when we engage in project planning?

- Simplicity
- Clarity
- Sensibility
- Buy-in

"Good communication does not mean that you have to speak in perfectly formed sentences and paragraphs. It isn’t about slickness. Simple and clear go a long way."

– John Kotter
OUR PROJECT PLAN IS SO COMPLICATED THAT FAILURE IS ASSURED.

BUT COMPLEXITY IS TOO ABSTRACT FOR YOU TO MANAGE, SO INSTEAD YOU WILL SPRAY MY ENERGY INTO THE VORTEX OF FAILURE.

I NEED YOU TO FINISH IT SIX WEEKS SOONER FOR A TRADE SHOW.
1. **(idiomatic)** To discern an overall pattern from a mass of detail; to see the **big picture**, or the broader, more general situation.

   *Smith is good at detail, but can’t see the forest for the trees.*

2. **(idiomatic, in the negative, by extension)** To be **overwhelmed** by detail to the point where it obscures the overall situation.
CASE STUDY

PROJECT REPRESENTS APPROX. 25% of $120M CIP

SCENARIO

- Modifications and optimization of critical airline passenger service systems
- Any impact to subsystems directly reduces checked baggage operational capacities
- Multi-phased construction approach as the only project delivery option

Active airport operations

18 HOUR CYCLE
## CASE STUDY

### TRIGGERS

Multi-phased construction approach adopted

<table>
<thead>
<tr>
<th>EXPECTATIONS:</th>
<th>ISSUES:</th>
</tr>
</thead>
<tbody>
<tr>
<td>A fully-vetted construction approach by the team</td>
<td>Some operational constraints / preferences shifted, requiring re-sequencing of some of the work</td>
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Re-sequencing to be addressed while field work was ongoing in earlier phases

<table>
<thead>
<tr>
<th>EXPECTATIONS:</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Team’s cognizance of operational priorities weighed against project priorities</td>
<td>Fast-moving field conditions w/o a vetted re-baseline schedule, with team members in a mode of “retreating into their own corners”</td>
</tr>
</tbody>
</table>
“It is the obvious which is so difficult to see most of the time. People say 'It's as plain as the nose on your face.' But how much of the nose on your face can you see, unless someone holds a mirror up to you?”

— Isaac Asimov, *I, Robot*
GANTT CHART EXHIBIT

3 of 6 pages of WBS; < 1600 activities; Segmented – Nth degree!
3 of 5 pages for Critical Path; WBS ranged from 1 to 20 activities / each
- Revised WBS on 3 pages; Reduction in Activities by 55%; Plan was a bit clearer
HOW WAS THE PLAN RE-DISCOVERED AND THE MESSAGE RE-CONVEYED?

- Tackled each sub-phase individually; Superfluous vs. Meaningful Plan Info
- Re-engage Stakeholders to shine a light on Operational Issues that Trump the plan
Kept folding in additional “scrubbed” sub-phases of work into the Network;
Exercise enabled other planning studies (forensic, what-ifs)
Submitted Update Schedule DD XX March 20XX (Recovery & Other Est Completions)
TAKEAWAYS

PLAN DEVELOPMENT

Stakeholders’ involvement
- Balancing contractual requirements and operational preferences
- Let’s not continue to let the “unclear scope” dog bite us, again!

Seek common ground
- Develop a Plan that the TEAM feels is sensible and achievable
- Team (from Client to Subcontractor) buy-in: through-and-through

Plan Focused
- Ensure that everyone still sees the big picture even when details begin to emerge
- Check back with Stakeholders often (Is everyone still onboard?)
- Is the message being conveyed clearly?
Brief the team on the potentials and drawbacks of the platform

- Scheduling 101
  » WBS, Scope Arrangement
  » Typical Fragnets, Typical Links
  » Key Milestones
  » Float Calculation & Definitions
  » Critical Path

- Not exhaustive, but enough to take the edge off
TAKEAWAYS

SCHEDULE MANAGEMENT

Interim presentation

- Before getting too far ahead – Huddle the team once more
- Review schedule, in the required platform, with Stakeholders
- Key: show the TEAM’s Plan within the Schedule
- Key: show how the Schedule details (within the Schedule of Record) are ALWAYS vertically traceable to the TEAM’s Plan

FROM THERE TO HERE. FROM HERE TO THERE. FUNNY THINGS ARE EVERYWHERE. - DR. SEUSS
TAKEAWAYS

SCHEDULE MANAGEMENT

Plan focused

- A responsible Scheduler KNOWS when to stop detailing!
- Clarity of MESSAGE above all
- Challenge: Details that HELP vs. Minutia that DETRACTS
- Changes: Ideally these are transposed on the Plan so that Stakeholders’ buy-in is maintained
Assume Responsibility

- Glassed-over eyes in the (Stakeholder) crowd often means confusion, frustration and disassociation

- Schedulers! – Don’t let the project Plan be handcuffed by the Schedule details and the Black Box operations of the Platform

- Breakout! – Go find the Plan, Show the Plan, Re-acquire Buy-in
IN CONFLICT RESOLUTION

“\textit{The trick to forgetting the big picture is to look at everything close up.}”

\textbf{Contracts = Positions}

\begin{itemize}
\item However Same Project = Servicing One Client
\item Mutual Understanding of Contractual Requirements
  \begin{itemize}
  \item Precise / Accurate Use
  \item Enforcement or a Letter-Writing Campaigns?
  \item Minimize efforts that are not conducive to Progress
  \end{itemize}
\end{itemize}

\textbf{— Chuck Palahniuk}
“The single biggest problem in communication is the illusion that it has taken place.”

– George Bernard Shaw

Affinity on Project Agenda (not individual company’s agendas)

• Defend the Optimization of the Project’s Delivery

Regard Project Impacts

• Formal Notification & Acknowledgement
• Prompt Magnitude Assessment (even if preliminary)
• Respect the Collective Expertise and Knowledge of the Team
THANK YOU!