Go Slow to Go Fast

Ryan Nagle, Envise (a Southland Industries company)
Prashant Dhillon, Leidos Biomedical Research, Inc. (formerly with Southland Industries)
Go Slow to Go Fast
Envise Formed to Grow Our Service Capability
Separation and Growth Creates challenges
Separation and Growth Creates challenges

Where were we?
- New people and new ideas
- Maturity levels varied
- Capabilities varied
- Different processes
- Responsibilities varied

Problems
- Underperforming offices
- Hard to compare and contrast
- Resource sharing was difficult
- Onboarding was inconsistent
- Hard to effectively improve
Intentional Approach

- Peer Groups
- End-to-end Process Focus
- Strategic Alignment
Strategic Alignment
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Where do we bite first?

How long will it take?
Strategic Alignment

Start here!
Fishing for Priorities
Make Priorities Visual

- Low Hanging Fruit
  - Project #5, $250,000

- Pursue
  - Project #4, $550,000

- Measured Response
  - Project #3, $150,000

- Monitor
  - Project #6, $550,000
  - Project #3, $80,000

- Value

- Readiness
Treat Each Effort Like a Project

Routine Executive Updates

Visual Plan for Field Teams

NorthBoundary Roll Out  Agreement Growth  Ryan

Deploy standard service agreement estimating and proposal tool to increase consistency across business that will enable standard sales rep training, onboarding and operational booking processes.

<table>
<thead>
<tr>
<th>FY19 Q4</th>
<th>FY20 Q1</th>
<th>FY20 Q2</th>
<th>FY20 Q3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepare detailed schedule and present approach to Branch Leadership teams to get buy in. Complete configuration and prepare training documentation.</td>
<td>Perform branch level training Rollout booking process</td>
<td>Continued Training Measure adoption incorporate into sales rep onboarding process</td>
<td>Measure adoption</td>
</tr>
</tbody>
</table>

Key Accomplishments
- Admin users setup for testing/demo
- Demo of NorthBoundary web version
- Defined functions to hide
- Defined pricing setup requirements
- Overview of tool with Joe Bagiu
- IT work complete

Key Actions - Next 30 Days
- [Ryan] Prepare schedule of activities
- [Ryan] Present plan to Branch Managers at EC
- [Jackie] Setup roles and users
- [Jackie] Define training deliverable list
- [Jackie] Set up branch pricing
- [Ryan/Jackie] Define measurement of adoption
- [Jackie] Prepare side-by-side estimate NB vs current tool
- Set up team meetings (add Joe B as SME?)

Risks / Issues
- Scope creep: sales process

NorthBoundary Roll Out Agreement Growth Ryan

Current State
Separate social and workflow templates used across branches for estimating and proposals. Training on current tool not documented and relies on oral knowledge.

Future State
Single tool for estimating and proposals that support the full value driven sales cycle for agreements of all types: MCM, E&O, Operations and Maintenance, as well as Analytic. The single tool provides data on operations to manage the asset and the information data in certain locations from which proposals can be generated without effort.

Problem Statement
Aims to deliver a tool for routine executive updates. The tool should include visual planning processes and a coaching framework for field teams.

Project Scope
Scope of Project:
- Coaching agreement booking package expectations
- Branch Adoption Activities:
  - Agile:
    - Simple tool
    - Asset class support for custom MCM setup
  - Maintenance:
    - Maintain agreement plan to enable sales for EPM
  - Support:
    - Field coaching
  - Not in scope (Exclusions this phase):
    - Non-MCM
Repetition Builds Momentum

- April 2018: Outside Facilitation
  - Top 3

- December 2018: Internal Driven
  - Manager Priorities

- May 2019: Team Accountability
  - Structured Process
  - Expanded to Coordinators
End to End Process Focus
Local Process Improvement – First Attempt

Challenge
Inconsistent work processes led to inefficiencies and decreased client value.

Focus on individual steps

Lack of awareness led to fixing wrong problems. Improvements were scattered
Step Back to See End to End Process

Just Do It - Task List
Reoccurring or Improve - Projects
Organizations/ System – Escalate Up
Success: End-to-End Process Focus

Challenge
Inconsistent work processes led to inefficiencies and decreased client value.

What we learned
- Focus on improving as ONE
- Use both Data & Context
- Mapped out Pain and Value Visual
- Found at the intersection of Value & Pain
- Identified levels of authority
# Manage Progress

## 2018 CRC Task/Project List

<table>
<thead>
<tr>
<th>S. No.</th>
<th>Task Description</th>
<th>Lead</th>
<th>Start Date</th>
<th>Deadline</th>
<th>Result</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Management enforces daily timesheet completion</td>
<td>Jody</td>
<td>7/23/2018</td>
<td>7/30/2018</td>
<td></td>
<td>Some issues with COINS mobile tech reporting. 10.8.18 Jody will ask to get timesheets from all field everyday next month.</td>
</tr>
<tr>
<td>2</td>
<td>Weekly review of service tickets for accuracy and billing (between supervisors and biller)</td>
<td>Drew/Keith</td>
<td>7/23/2018</td>
<td>8/2/2018</td>
<td></td>
<td>Consistent weekly meeting.  Not completed at end of month any more. Currently billing in 5-10 business day period. 8.10.18 10 days is realistic with the way labor hits the calls.</td>
</tr>
<tr>
<td>3a</td>
<td>Weekly billing - SO’s identified as ready to bill</td>
<td>Brandon</td>
<td>7/23/2018</td>
<td>8/2/2018</td>
<td></td>
<td>Consistent weekly meeting.  Not completed at end of month any more. Currently billing in 5-10 business day period. 8.10.18 10 days is realistic with the way labor hits the calls.</td>
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<tr>
<td>3b</td>
<td>HVAC 5-10 business days</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4a</td>
<td>Create script for taking service calls</td>
<td>Janae</td>
<td>7/16/2018</td>
<td>9/1/2018</td>
<td></td>
<td>Will talk to Joyce about capability. Different answers from accounting personnel. Brandon will talk to Steve Perkins about opening all 15 vendors.</td>
</tr>
<tr>
<td>4b</td>
<td>Modify Technician Matrix - HVAC</td>
<td>Drew</td>
<td>7/23/2018</td>
<td>9/1/2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5a</td>
<td>Modify Technician Matrix - Controls</td>
<td>Keith</td>
<td>7/23/2018</td>
<td>9/1/2018</td>
<td></td>
<td></td>
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# A Pattern Starts to Emerge

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<thead>
<tr>
<th>Strategic Alignment (National)</th>
<th>End to End Process (Local)</th>
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<tr>
<td>Leadership Team</td>
<td>Local Leadership Engaged</td>
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<tr>
<td>Connect Impact to Strategy</td>
<td>Align on Vision</td>
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<td>Facilitator Lead</td>
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<td>In Person Workshop</td>
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<td>Value / Readiness Map</td>
<td>Value vs Pain stickers</td>
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<td>Top 3</td>
<td>Do it now</td>
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<td>Project Plans and Sponsors</td>
<td>Action Register with Assignments</td>
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Peer Groups
Peer Pressure
Failed Attempts

**COME ON!**

YOU KNOW YOU WANT TO VOLUNTEER!

**EMPLOYEE TRAINING**

IT'S KIND OF A BIG DEAL
Intentional Collaboration

• Leadership engagement
• Conditions of satisfaction
• Well designed agenda
• Outside facilitators
• Multi-day workshop
• Made it personal
• Used past efforts built momentum
Met Conditions of Satisfaction:

- Coordinator Role Defined
- Identify Subject Matter Experts
- Provide training and onboarding framework
- Establish a Peer Group (Team Charter)
- Defined key function and roles
- Identified Top 2 priorities for next 12 months

+ Created a positive emotional experience
+ Identified personal development
+ Created team accountability
How can you build momentum?

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<thead>
<tr>
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<th>End to End Process</th>
<th>Peer Groups</th>
<th>Common Threads</th>
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<tr>
<td>Leadership Team</td>
<td>Local Leadership Engaged</td>
<td>CEO Participation</td>
<td>Top down support creates urgency.</td>
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<tr>
<td>Impact to Strategy</td>
<td>Align on Vision</td>
<td>Develop Team vs Training</td>
<td>Meet the team where it is. Be intentional.</td>
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<tr>
<td>Facilitator Lead</td>
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<td>Facilitator Lead</td>
<td>Start strong with outside help.</td>
</tr>
<tr>
<td>In Person Workshop</td>
<td>In Person Workshop</td>
<td>Mix of personal development</td>
<td>Make it personal. Make it engaging.</td>
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<tr>
<td>Value / Readiness Map</td>
<td>Value vs Pain stickers</td>
<td>Value vs Pain stickers</td>
<td>Make priorities visual to an alignment.</td>
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<td>Top 3</td>
<td>Do it now</td>
<td>Project</td>
<td>Escalate</td>
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<tr>
<td>Project Plans and Sponsors</td>
<td>Action Register with Assignments</td>
<td>Team Charter &amp; Champions</td>
<td>Provide authority to create accountability</td>
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Momentum Builds Slowly
In the spirit of continuous improvement, we would like to remind you to complete this session’s survey in the Congress app! We look forward to receiving your feedback. Highest rated presenters will be recognized.
Contact Us

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