

Training trumps assessments

Upstream NGL, P&P, Steel, Municipal, Mining**Situation**

Traditional consulting engagements begin with some sort of an assessment to quantify and qualify the current state, relative to some potential future state. Many consulting firms talk about “best practices” as their standard. We have done much the same ourselves, but realized there were problems with that approach to beginning an engagement:

- There was often a great deal of angst about the assessment results, particularly at the shop floor and middle management levels, but for different reasons
 - Middle management was often embarrassed by the results
 - Shop floor (production, maintenance, stores personnel) were wondering why an outside organization was needed to tell “management” what they already knew
- The value of having an outside organization do the assessment was inevitably questioned
 - What they got in the report was largely a re-iteration of information they had at hand, but had been ignoring. So, why didn’t someone in “management” just dig it out themselves?
 - The improvement ideas, usually quite good, were mainly ideas that came from within.

There was a valid criticism that the consultants were merely borrowing their own watch and then telling them the time. The consultants, even if highly experienced, were inevitably new to the site and situation, so “street cred” was always lacking.

We took it a bit further and noted that we have rarely been invited to perform an assessment where performance was already known to be good. In fact, the opposite is what happens. The client already knows they have a problem. The assessment only serves to quantify it (i.e.: how bad is it really?) and produce improvement ideas that were, prior to the assessment, not recognized. All too often the assessment report is referred to as, “the consultant report”, not as their own. They had no ownership of their own situation.

The complaints from the floor and management all served as resistors to change. Whenever a decision would be made to actually do something about the situation, if the actions were based on the consultants’ report, then those most impacted wanted nothing to do with it.

Solution

After careful thought, we realized that it was the lack of ownership that led to the resistance and ultimately reduced the chances for success. Considering that the customers often had the improvement ideas already, but ignored them, how could we get them to listen and act on their own ideas?

One thing that consultants have, that most customers do not have, is a lot of exposure to successful practices in a variety of industries and settings. They have a good idea of “what good looks like” and they have seen many improvement (change) initiatives – some that worked, some that did not. We mused that since the customers already had most of the good ideas, they only needed the confidence that those ideas would work. How do we nurture that confidence?

Training. Provide the customer with a sense of “what good looks like”. Once they have that, they will quite naturally compare their own present state with that new “standard”, recognize that they have room to improve, and they’ll have a sense of what to do about it. We modified our approach and began to promote it with our new clients. Some were open minded and went with our suggestion, some were not, and opted for assessments.

Our approach comprises training in successful practices. We argue that there are no “best practices” because you can always improve, and you’ll never really know if the best you’ve seen, is truly the best. But it’s pretty easy to spot what works well, so we go with that achievement as our standard. In our field of maintenance and reliability, we also find that it doesn’t matter much what industry the customer is in – the assets we are managing, don’t know the difference and still need to be managed the same ways.

During the training, the customer sees what they could be doing better, so we capture those ideas. Near the end of the training we have them complete a brief self-assessment. Invariably they give themselves fairly low scores if performance is indeed low (we’ve yet to find a customer who is dishonest with themselves in a group setting). They can then see quite visibly that they’ve got room to improve. Then we use the ideas. There are usually some repeated ideas and many that are related to each other. Typically we will find that there are a dozen or more improvement idea groupings. Those are destined to become improvement projects.

As experienced assessors, we can see quite clearly that those results are not much different from what we would most likely have recommended. More importantly though, whatever it is they decide they should do, the ideas and decisions are theirs, not ours. They already own it.

Reflection and Results

We have modified just how we carry out these engagements as we learned, and we’ve seen clients achieving tremendous results, largely on their own!

Our “Uptime Pyramid of Excellence” is the basis for our training. It describes successful practices in an easily understood and easily absorbed way. The model has been in use for 25 years. It has been used in just about every industry and achieved improvements, some truly remarkable, and some even where only half-heartedly implemented. It simply works.

The training itself is highly interactive – there are plenty of discussions and ideas are tossed around openly. No question goes unanswered and we utilize examples from multiple industries. Even though the customer is used to their environment, they quickly see that what they are doing isn’t really much different at all from others. They become very open to learning how others, often with more at stake are doing, and what results they achieve. They see how emulating what others are doing they too can achieve higher performance. Throughout the training, the customer’s staff are having a conversation with themselves and with the subject matter experts who are teaching the course. They are engaged and, even if initially resistive, they get onside with the idea of making changes for the better.

We had private sector learning from practices in the public sector and vice versa. Steel makers learning from mining, mining learning from chemicals, pulp and paper learning from municipal, etc. All have learned something new about “what good looks like”, compared with it, seen that they could be doing differently and had ideas on how to achieve it.

The training sessions are truly far more than just “training”, although that is what they’ll be referred to as being. At the end of the sessions they’ve learned, applied what they’ve learned to their own situation, documented what they can do to improve, gained respect for each other (in many cases these classes are the first time they’ve been together discussing performance), and they’ve created a basic plan of action that they truly own.

The time it takes to run a few such classes is typically less than the time it takes to do a full-blown assessment and it requires fewer consultants to do it. It is actually quicker and less expensive than a conventional assessment and the result is superior. Assessments tend to be disruptive in terms of the anxiety they generate before the report is released (if it ever is released). They do not require a lot of time from individuals – typically just interviews, but individuals often feel that they haven’t had their full say by the time the interviews are over. More and longer interviews burn up a lot of time. The downside of our approach is that it does require “classes” to be formed so it takes people away from their day-to-day jobs for a few days, but they have yet to say they regret doing so. Those classrooms are filled with people from various disciplines, mechanical, electrical, instrumentation, stores, purchasing, human resources, finance, planning, operations, logistics, etc. We highly recommend that the group be mixed in terms of discipline, department and experience. The discussions that occur are every bit as important to learning as the class content itself, perhaps even more-so.

We learned about assessments. We wanted better results, so we had a hard look at what we were doing, changed our thinking about approach and observed how it worked.

Likewise, if you want different results, you will need to change what you do. To do that you will need to change what you are thinking, and that requires you to learn, be open to new ideas, have discussions and make decisions about future actions.

To learn more

If you are considering the need to make improvements, to learn more and to get your people truly engaged in those improvements, consider our approach. We are happy to discuss it with you and how best it might be applied in your situation.

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