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# Where's the fire? A Plant Manager's tale



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# THE INCIDENT

Life insurance, car insurance, homeowner's insurance; it was surely a salesperson eager to sell something of this sort on that Sunday morning. My mind seemed more focussed on guessing who was at the end of that ringing phone, rather than answering it. I picked up eventually, fully prepared to give the caller a piece of my mind for phoning at such an absurd hour.

"Hello", I said; not bothering to identify myself.

"Fred? Is that you?", says the caller.

"Yes, who is this?"

"Fred, its Sarah Millingham. I'm on shift this weekend."

"Oh hello Sarah." Immediately trying to figure out why my Plant Manager would phone me on a Sunday at 7 am. Nothing specific came to mind, but one thing I knew for certain was the call would not be good.

"Fred, there has been an incident. No one is hurt, but about an hour ago we had a fire break out in the plant.

Sarah was doing a fine job maintaining her composure.

However bad the situation turned out to be, I was grateful that it was Sarah on shift and not her colleague Derek. A call from Derek would have been nothing short of hysteria.

"Not quite sure what happened but maintenance were working on a minor refurbishment when the alarms blared. Fire trucks are here and say they have it under control". Sarah was clearly doing her best to assure me everything was under control.

"Is the fire out?" I asked hopefully.

"Pretty much. It looks as though a small gas leak may have been the cause. Maintenance was replacing gas supply lines to suit the new floor layout and so the whole area would have been isolated in terms of power, gas and water."

Pulling my coat on and trying to sound calm "Ok, I'm on my way. Who else knows?"

"No one yet, but I guess we need to get the Response Team together?", Sarah asked.



It was a Sunday but this is a recordable incident. We could wait until Monday to bring the team together but if one of the workers was even close to being hurt, anything less than an immediate response would clearly not be acceptable, especially as the Response Team was my idea. Time to put the procedure to the test.

"Yes'" I agree, "Call the team and let's plan to meet in one hour. I know some of the guys will take longer to get there but I can be there in an hour, so let's aim for that".

I was fully awake now and prepared for what I suspected would be a very long day.



# FIRST RESPONSE

As I drove towards the plant I knew that as Director of Operations, it was my responsibility to lead the Response Team thanking my lucky stars that after 20 years I'd never had to deal with a significant injury causing incident. But a good history has no bearing when bad things happen and I knew that all eyes would be on me. I'd have to be at the top of my game. We would need to understand quickly what had occurred and how and what steps we'd need to take to prevent it from happening again.

The plant looked very different on the weekend. Without most of the office staff on duty there was an unusual empty feel to the place. As I approached the main gates, a security guard stepped out, "Welcome to Viddaco. Did you really mean to visit us on a Sunday or did you just make a wrong turn?"

As I was in charge of over half the workforce and all the operations, I concluded he was obviously new.

"I am Fred Dinage, Director of Operations."

"Oh sorry Sir, no one told me you were coming in. I guess you're here because of the fire", he offered, "I do still need to see your ID."



"Of course," I said as I presented him my site pass, still feeling a little irritated that he hadn't recognized me.

I made a quick stop in my office then on to the meeting room where Sarah and Derek were already waiting. "Morning Sarah, morning Derek", wondering how Derek managed to get here so quickly. He lives further away than me. Perhaps he was a real early riser on a Sunday and maybe he drove rather than biked or ran as he usually does. I wished I was more the outdoor energetic type.

"Morning boss." Derek is my other Plant Manager. Sarah is the more senior of the two; but Derek had a way with people; but not a particularly good one sadly. I was fully prepared for his reaction to the situation; he'd be looking for someone to blame.

No sooner had Sarah, Derek and I sat down and the conference table, we were up again greeting three more folks from Response Team; two Operations managers and Carl,

the Project Manager in charge of the refurbishment work. I honestly can't say I knew them all that well; certainly not on a personal level. In fact, I'd only met Carl recently because he reported up through the Projects Group.

"Ok, let's grab a coffee, sit down and see where we are" I said, trying to show I was in control and ready to lead.

"Sarah why don't you give us a quick update please?" I asked.



"Ok. At about 6am this morning the fire alarm was sounded over in building Y22. This immediately notified the fire crews who got here in less than 10 minutes. Two workers were in the area when the fire broke out and both have minor burns & some smoke inhalation. They seem fine, but we got them off to the hospital just to be sure."

"What or who caused it?" interrupted Derek. True to form, he was already looking to blame someone.

"We don't know yet Derek" responded Sarah, adding "I've been more focused on making sure everyone is safe!" There was no mistaking Sarah's irritation with Derek.

"Look, something like this almost always comes down to someone not doing their job properly" Derek insisted. "I'll bet that someone did not follow our procedure for shutting the area down."

"Derek, let's work through this. Sure, we'll get to the root cause, but let's make sure our people are safe, take whatever quick steps needed to keep them safe, then focus on figuring out exactly what happened." I felt in control. That was good I thought.

"Absolutely" continued Sarah "I've closed the area; no one is allowed in until the fire crew has finished and provided us with a verbal report. The chief said he should be ready within the next hour. Once we review the report we can decide if and when we reopen the area."

The small building referred to as Y22, was about 2,000 square feet and one story. It contained a few electric supply junctions, as well as three gas boilers. Not big boilers, but enough to send heat through 8 other buildings on site. We were refurbishing the supply lines, (gas, water and electricity), since that building must be close to 50 years old. It also needed some structural repair work on the roof. The project had only just started a month ago, with Carl, the Project Manager, in charge.

"Ok, so once we have the report we can start to make plans. But for now, the place stays closed and the project is on hold" Carl piped up, "Okay, I will let my boss know in the morning; seems pointless to disturb him on a Sunday."



I wish Sarah thought like that. For a brief moment I was back in my kitchen eating breakfast and having a considerably better cup of coffee. Back to reality Fred, I thought, this is really important.

Carl added, "I will need to give him a detailed report, so if you can share that fire crew information Sarah as soon as you've got it, I'd sure appreciate it."

"Of course Carl" replied Sarah, "I'll circulate it to the team. In the meantime, maybe we can walk to the building and see what we see?"

"Yes" I stepped in "let's do that. I'd like to see just how minor this was."

We walked out the main admin block toward the plant and as we neared building Y22, the oddly quiet Sunday feel vanished and was replaced by lots of commotion, people milling about, fire crews winding up hoses and gathering various other pieces of equipment. You could still see small plumes of smoke escaping from a hole in the top of the building.

"Wow, looks quite bad" said Carl.

"I am telling you right now, this was caused by someone who did something wrong. I promise you we'll find out that someone didn't follow procedure. Seen it a hundred times," Derek said, ready to wage a full out 'find the culprit and pin them down' campaign.

"Well, if this was gas, then surely it means it was not properly isolated", I said. At that moment, it seemed pretty straight forward.

Sarah was quick to chime in, "it does seem that way, but let's not jump to conclusions. We really don't know whether it was operator error or whether someone had the wrong procedure to follow." As ready as Derek was to place blame, Sarah was equally ready to keep us focused on uncovering the facts before coming to any conclusions.

Just then, the fire chief approached. He wore a different helmet than the rest of his crew. Well, that was my assumption anyway. When he took off his helmet, he bore an uncanny resemblance to Kurt Russell from the film Backdraft. A terrible film for the most part but the realities of a rapid introduction of oxygen to a burning fire is well documented.







"Who is in charge here?" he asked, looking at Sarah. I figured he had already spoken with her and hence assumed her leadership.

"I am" My voice sounded a bit weak compared to the chief. "What's happening?" I asked.

"Well, the fire was actually a small explosion of sorts; an ignition of gas. On a quick inspection it appears that one of the four valves that isolate these lines was not closed." He said.

"Oh heck!" I wish I had said something more professional, but I didn't. "So it was left open for gas to come through?" Talk about stating the obvious.

"Err, yes Sir, that would be what happens when you leave a valve open and tear off the other end of the pipe it is feeding" he replied. Definitely with sarcasm which I suppose was deserved.

"Right, told you!" Derek blurted out in his annoying voice, "human error. Some idiot ignored the procedures that we sweat blood and tears developing and making sure they have!"

Sarah was looking a little upset. She was clearly still more concerned about the workers wellbeing. She was looking over the fire chief's shoulder at the blackened faces of the other fire crew members. "Is everyone ok, and by everyone I mean your crew too?" she asked.



"Yeah, no major injuries, thankfully. My team is just always dirty, comes with the job. Your two folks got some minor burns and one of them inhaled a fair bit of the black stuff, but they'll be fine according to the paramedics". He spoke with a reassuring confidence.

"One more thing" he continued "one of the guys did say that he shut all the valves."

"He's bound to say that" Derek interjected.

And the fire chief was quick to add, "Yes, but Sarah, according to the copy of the building plan you gave me when we arrived, the valve that appears to have been left open doesn't even exist."

With that revelation, the mood quickly changed and everyone went quiet. Somehow, at that moment, human error was a more palatable answer.

Could it be that the maintenance guys were not aware of a fourth valve? How could that happen?

There was a long silence. Probably only 30 seconds, but it felt like an eternity. How could it happen that a current schematic was not available and that the documentation that our maintenance guys were relying on, that was given to the fire crews, was not correct?

We quickly came to the realization that not only would a thorough review of the documentation, drawings and procedures specific to building Y22 have to be done right away, but plant wide as well. This could cost us a fortune; the manual checks would be expensive. And a partial or full shut-down could be necessary and that, my friends, would be extremely costly.



# DISCOVERY

I was never a fan of Monday mornings (who is really?), but the Monday after the incident was worse than most.

“Morning Shaggy” my wife shook me with a grin.

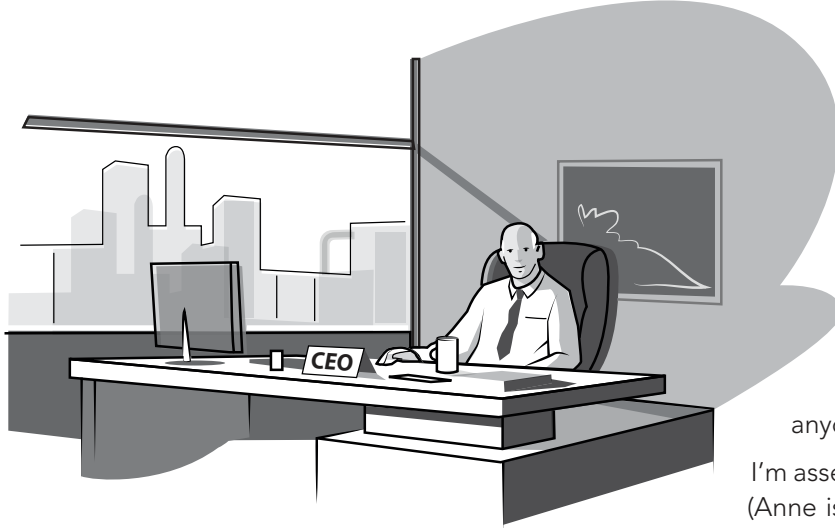
She often called me Shaggy and this particular morning it was in an attempt to lighten my mood. The nickname goes way back; back to when we first met. She wondered if I was called Fred because I resembled Fred from the Scooby Do cartoon as my hair often stuck up all over the place in the morning.

Before leaving the plant yesterday, we (me and the other members of the Response Team) had spent several hours reviewing and attempting to formulate a plan. We had come to the conclusion that somehow the procedure used to isolate that building made no reference to this now infamous valve. Clearly a gremlin had snuck in one night and installed a fourth valve; or so it would seem.

The plant documentation and the ‘as builds’ were managed in three major systems plus other programs being used by various teams within the Projects Group and my Operations Team. None of these ‘talked’ to the others. This was bad enough, but we also had to consider the strong possibility that folks were working outside of these systems, relying on local hard drives and or hard copies that we’d eventually find stuffed in someone’s drawer.

I knew that my first visit this morning would be to the CEO, my boss. I knew he would not be pleased of course, but I also knew that he would listen and take stock of the facts before taking any action. “Hello Susan, is Reggie in?” Susan was Reggie’s Executive Assistant or rather (Reg R. Raymond). Reggie, a tall unassuming man, knew his stuff. He had come up through the ranks at Viddaco and made it to CEO after a career spanning nearly 40 years. He was a company man, and proud of it. He would take any incident, no matter how small, to heart. Of that I was certain.





"He sure is, go on in" Susan replied.

Reggie was busy reading emails it seemed but aware enough of my presence to talk to me without looking up.

"I hear we had a bit of trouble here yesterday, what happened?" he said.

"Yes, a safety incident; a small fire. Thankfully no one was hurt aside from a couple of minor burns and a little smoke inhalation (a little smoke inhalation... how stupid does that sound?) and after a quick trip to the hospital, both maintenance workers are safe and sound at home. ", I said trying to recover.

"Good!" says Reggie, "that's the important thing. So are you on it? Do I need to do anything; say anything to anyone?"

I'm assembling the Response Team, including Anne (Anne is Anne Jackson our CIO), this morning at 9 o'clock to work through an action plan. I'll be sure to cover off communications as part of that." I said.

"Ok Fred, get to it. Just make sure and circle back before noon today to let me know where we are."

"I sure will Reggie." And at that I left; figuring it was best to get out before he thought of any more questions.



As I walked into the meeting room, I was greeted by the Response Team and a couple of folks from the Project Group. They were not the maintenance workers who were on the job and involved in the incident but I had seen them the day before talking to fire crews.

Duncan Fogel my counterpart from Projects and I are peers; with him looking after the Projects and me covering Operations. We shared a beer or two on occasion such was our relationship. It was very important we got along, was how I always saw it. I trusted Duncan, and I believe he trusted me as well.

At the other end of the table sat our CIO, Anne, preparing her notepad for action.

"I could do without this". Anne broke the silence So, what's going on?"

We took turns describing the incident and sharing what we knew so far, i.e. missing valve on drawings and isolation procedure documents, valve not closed, gas escape, fire and so on.

Anne was new to our business. She had only been appointed six or so weeks ago and was not entirely up

to speed with how documents and procedures were managed and shared across the business. Her role in all of this would be more one of listening, asking questions and supporting the team in finding and funding the solution.

Sarah, on the other hand despite her youth, was something of an 'oracle' in our business and had tremendous insight into our 'ways' and processes. Her input here would be invaluable.

Sarah offered her summary, , "We believe the root cause of the incident to be poor document management. It's as simple as that. The maintenance workers followed the schematic and isolation procedures, closing three valves per the drawing. They did nothing wrong. What we need to understand is why the fourth valve was added, by whom and when and why true documentation was not available, and if this is an isolated incident or not."

"Do we know what area was responsible for the addition of that valve? Was it a project we did recently?" Duncan had the ability to sound happy even when he was not. "I mean; how could this happen?"



"That we don't know" I responded, "our job now is to sort it all out, communicate internally what needs to be done and give Reggie something he can say to anyone external."

Duncan said firmly. "I can tell you this won't come down to something in the Project Group.

We do everything the way we are supposed to in our system". Duncan is rarely so direct, and never defensive.

"Hang on there a minute." Derek finally found his voice again, "I can tell you that this will be a lack of documentation handover to Ops, it always is. I bet those updated drawings and specs are sitting on someone's desk over in Krakatoa". Krakatoa was a name we used for the building where the Project Group sat. The joke was it was always about to explode such was the pressure and workload on the people there.

"Guys, please. Let's work together not against each other!" I said it knowing full well that it would be much easier said than done.

"Okay, here is what I think we should do" I continued before anyone else could jump in. "Sarah, you will lead an investigation into this very specific incident. That is, find as much as you can about that valve and where it came from."



"I want Duncan and Derek to work together to look at the wider issue of why documents get lost or out of date or whatever between Projects and Operations. Anne, will you assist and use your influence to make sure we've got everyone's full cooperation?"

"I will, but honestly, I don't think we can solve this on our own." Anne volunteered

"Why do you say that?" I questioned.

"Well, from what I have seen in my short time here and from what I've heard just now, we have way too many systems and processes, many of which either overlap or contradict each other. And it's been this way for many years. Most of the people that work here are used to their one way and their system, and they can't see, and probably don't care to see, what others are doing. There is a lot of history here and where there is history there are habits and a culture and those things are difficult, at best, to change."

She was pretty direct and we all felt a little put out. Yes, we had many systems but I thought they were all working okay; maybe not perfectly, but better than good enough.

"Therefore," Anne continued, "I think we need some help. Help from someone that can objectively determine where we are now, where we need to be and how to get us there. And it needs to be a professional from the outside. I just can't see how any one of us or anyone within Viddaco for that matter could accomplish something this important quickly and effectively on top of existing responsibilities.

"Ok" I said, "That makes sense so who do you suggest?"

"Well, we can look for a consultant that specializes in document management but I think we need more than just that."

"Explain" I said, intrigued.

"We need someone that knows how we should be doing this, not just about where documents get filed and not just about fixing this one issue. Prevention is the best cure and all that." she continued to make her case.



"Ok, so we want someone that knows document management, engineering practices and our industry, and that can work with our dinosaur of a team to figure out what we're working with?" I said with a hint of sarcasm.

"All of that yes, and then we'll need them to help us find the solution, not just to identify the current situation and issues, but if we do need a new system, lead us in describing what we need and selecting the best path forward, the optimal solution."

"Selecting a piece of software to manage documents is child's play, just Google it", even Duncan was getting in on the action now.

"I disagree with you there Duncan", Anne was not having that. "It takes a lot of experience to know what systems are not only good, but good for us. I have many stories of failure I can share if you need convincing?"

"Well, all I can say is good luck finding someone with that capability", Derek was feeling left out.

"Let me make some calls", said Anne, "I know people that have called on outside vendors to help in this sort of situation. Makes sense to start there."





# THE PLAN

A month had passed and still this issue was top of my list as it would be some time until we had a comprehensive solution. We'd identified the root cause of the incident, which by the way was a lack of process around updating documentation, but we'd yet to come up with an appropriate fix.

Someone had fitted a valve almost a year before the incident, along with some other upgrades. The drawings were updated and signed off by my group as a true reflection of what was there. The problem was that the revised drawing remained in the hands of the Project Group and never made it over to us, which meant that our procedure for managing the isolation of the building was based on an old drawing, which did not show the valve in question.

So we knew we had a problem and we knew we needed a fix. I had followed Anne's advice. She had knowledge of potential vendors and could help sell whatever solution we land on to Reggie and secure the funding we would need to finance it.

So we had called in the Ghostbusters. That's what I called them anyway.

We waited in the conference room for our own personal Dan Aykroyd or Bill Murray to show up, armed with ghost traps and tractor beam guns, or whatever those things were. I often thought how cool it would be to actually capture a ghost.

Right on time, our visitor arrived brandishing a small case, probably carrying a laptop and notebook. He introduced himself as Zac Smith, a young looking man who I really hoped came with more experience than his appearance suggested.

After short introductions to Anne, Derek, Sarah, Duncan and me, and the engineers from the Project Group plus a document controller from Operations, Zac began.

We had expected we were in for a long sales pitch, one where we just sat and listened. Our large coffee cups were known as the 'keep awake cups' for that very reason.





It was Anne that broke the silence saying, "Well Zac, we've called you in to help us figure out what we need to do to make sure we better manage our documentation, processes and procedures. We had an incident 4 weeks ago that highlighted the fact we are, for want of a better phrase, a misaligned mess."

Zac continued, "I see, so, can we start at the top? Explain your business to me. Forget about who owns what, and what's broken for now, just tell me what you do and what information needs to be shared across the business."

But Zac, to his credit, had no slides. He didn't even offer up his background, experience or anything about his company, Creideas. Instead, he simply asked, 'why am I here?'

"Uhh, well, we assume you are going to fix all this for us" responded Derek quickly.

"Ok", said Zac, "but what is it that you want me to fix and why does it need fixing?" No one spoke.

It was now lunchtime and all we had accomplished in the three hours since we started, was to provide a description of what we do and why and answer a bunch of Zac's follow-up questions. Questions that, by the way, made it pretty clear that Zac was listening, all while taking a bunch of notes.

There was definitely something about this man in front of us.



He did not play with his cufflinks making them shine in the office light so we could all see them, nor did he talk down to us, which was something a previous consultant had done. Odd as it may seem, in those three short hours, Zac seemed to become one of us.

We broke for lunch and I took that opportunity to switch our conversation to a more personal level. This man, Zac, had been working for clients like us for over fifteen years, and all that time he focussed on solving issues just like ours. He had a wife, two children and two rabbits that drove him mad because he had to do all the cleaning out. Zac was quite normal and after some casual discussions over a quick lunch seemed even more like one of us.

We were just back in the conference room when Zac asked if we could break for a few hours to allow him to spend some time in the plant with the engineers and document controllers that were 'on the job'. We were a little surprised to find he wanted to dive to that detail so quickly, but let him we did, and agreed to meet back in the conference room at 4:30.

Twenty-five past four and I was sitting in the conference room along with the rest of the team, waiting for the return of our new friend, Zac.

In he walked, smiling and sharing brief greetings.

"Well, I've had a great couple of hours with your teams. I'd love to do more but the discussion this morning and the short time with your teams has given me a good feel for what you do and where problems lie, he said, sounding like he had found the silver bullet.

He continued, "I will tell you now there is no silver bullet, there never is." And with that my dream was over before it even started. Zac explained, "I have much more assessing to do, but I have already seen where your processes are breaking down. You have two distinct areas producing and managing information, Projects and Operations. Alongside these of course are your HR, Finance, and other areas' systems. But these two key areas, Projects and Operations, are responsible for your line of business documents and data, so it is critical that these are perfectly aligned and working well for you."



He was preaching to the choir before adding, "Right now; however, there are opportunities for the sharing of information that is incorrect, out of date and in the Project area, simply late."

"What do you mean by late?" Derek interrupted, sounding intrigued and strangely prepared to listen.

"Well, even at this early stage I can see that you are not properly tracking the return of your vendor documentation, you are not returning comments and change requests in line with the contractual turnover times. Or at least the turnover times your team believes are in place", Zac replied.

"That can't be so, can it?" Derek responded.

Zac elaborated, "You have no reportable means to check 100%, but there are examples I have seen today where documents received over a month ago have yet to be reviewed."

"Won't this mean penalties Duncan against our vendor contracts?" I asked.

Duncan was quick to respond, "Yes it would, but let's not jump to conclusions here, and we need to look at the actual contracts to see what's what. If there are documents and drawings not getting reviewed on time, they may be getting accepted as correct by default, which would be a far worse situation." Duncan rarely appeared ruffled, but this revelation was troublesome to say the least.

Zac took back the conversation saying, "I agree completely. Again, I have only spent a few hours looking at this but I've seen enough and I can tell you that what I have seen based on my experience is not at all unusual.

"What about operational processes Zac, anything jumping out at you?" I asked.

"Well, alongside the turnover of vendor documentation, I see two other areas where we need to dig a bit deeper to evaluate how they are working. I don't feel that these are completely robust. These are the handover of project documentation to the operations and the management of equipment information while being maintained and updated."



"Well I suspected that the handover process was weak" agreed Derek, "I have said for some time that we rely too much on manual processes to decide what goes over and when."

"Yes." Zac picked it up again. "The handover process does seem to be more manual, which is not to say it's wrong of course. But I did see evidence of ambiguity in the identification of documents which should be included in the handover. I did not find any controls that would ensure future changes to those documents are fed back to operations. And, if my understanding of what happened here last month is correct, this was in fact the root cause."

So we knew we had improvements to make; just a few more than we had anticipated.

"In terms of the management of equipment," Zac continued, "I notice that you've got a separate system for asset information management which is fairly typical. However, there is no link between that and where documents and drawings are managed. The missing link is problematic. When I asked one of your team to locate all drawings related to a specific equipment tag number

he said it couldn't be done, at least not without running multiple searches against multiple systems and even after that, he said he couldn't be confident that he'd found them all."

Sarah, Derek and I nodded unison, and Sarah spoke for all of us, "Well yes, we are aware the separate systems are not linked and that some things are not always easy to find, but they do exist and it is possible, with perseverance."

I added, "If we don't know exactly where a certain piece of equipment is used, how can we be sure to update everywhere that part is changed?"

I was now feeling like we were meeting with a psychiatrist or marriage counsellor, not that I have been to either I might add. But that's kind of what I think it might be like; all of us admitting to our issues and agreeing that we want to fix them. I was feeling less dread about what faced us and more excitement at the prospect of moving us toward a better set of practices and systems that would give our teams what they needed to do their jobs more efficiently, effectively and safely.



Zac chimed in, "There is a solution and I can help you identify it and implement it. I guarantee that together we will make this work and that you'll be so pleased with the results you'll want to share your experience and refer our company to anyone and everyone. Zac was extremely confident and his confidence was contagious, as I found myself saying, without giving it a second thought, "Okay Zac, so what's next?"

"I suggest we work together to find the right approach. It starts with understanding and documenting exactly what you need; looking at all the potential products and solutions, choosing the one or ones that meet your needs; building a clear development and implementation plan; executing that plan, and making sure we have the necessary structure in place to maintain and improve."

"Throughout all this" Zac continued, "one ingredient will be key and that is engagement."

"Engagement?" Anne asked.

"It is up to all of us to keep your teams, every one of them, engaged in what we are doing. If we lose them at any time, we won't achieve the successes we hope for. This includes your CEO, who I expect will want to ensure the plan has an appropriate vision."

We were all in agreement.

"Throughout all of this, I will be here working alongside you. If I think that you are trying to do something that will lead you down the wrong path or cost you more than you've budgeted, I will tell you. Anticipating and guiding and being open and honest no matter what is part of my job."

"Thank you Zac, I don't think we would want it any other way" I responded. To me, to all of us, what he said just made sense.



# EXECUTION

For the past three months, Creideas, led by Zac, worked with us through several sessions and workshops to help us understand what we needed and just as important why we needed it.

We gathered and documented information from multiple sources within the plant. Creideas also lead us through a successful tender to purchase suitable software, which was actually far more challenging than I had imagined. Surely, I thought, having people come in to sell us their solutions and systems would be child's play in comparison to the rest of the process. Listen, ask questions, watch a demonstration or two, and then make a decision.

But the vast array of solutions pitched by vendors, who had all the right reasons why their solution was the best, had us struggling to make sense of it all.

Thankfully Creideas was engaged in this part of the process. They helped us articulate our requirements and assessed each vendor relative to solution, fit and suitability of the software and then presented us with their recommendations.

With all of this done for us, we were pretty quickly and with great confidence, able to identify our preferred software vendor.

Next step was to implement the new solution. This is never easy and often dreaded given that our days are already so busy and staff are reluctant to accept change let alone participate in its application.

I'd decided to hand this project to Derek. He was a Project Manager by training although in recent years had been working in his role as Plant Manager. Derek could be a pain and he was surely a bulldog, he got things done and was quite successful at getting 'buy in' from everyone involved.

Today was 'kick off' day; the day we begin to execute our implementation plan.

Zac was already in the conference room, with one of his colleagues who introduced himself as Project Manager David Zane.



Zac would take the role of lead consultant, David the usual project oversight and various other people from both organizations would actively participate throughout the next few months.

"So, are we clear on what we want to achieve in the next few weeks and months?" David asked.

"I believe we are" replied Derek. I was expecting him to say more, or question David in some way but he didn't.

"Great, well let's walk through the plan of activities, make sure every aspect is understood then we can get to work" David continued "we have a lot to do!"

"Yes we do" I felt obliged to contribute, "and I can say we are all looking forward to a successful implementation". Suddenly I felt all important. I was the project sponsor after all.

"Well, we've worked hard together to bring us to this stage" said Zac, "now we just need to realize what we envisioned, and I am confident we can do this."

At that, David pulled up a list of activities and actions on a project schedule and we stepped through one by one, breaking for a coffee only once.

When we were done, it was clear we had a good solid plan.

"How confident are we that we can migrate all of our data into this system without any major problems?" was the only question I felt necessary to ask. I knew from past experience that any system is only as good as the data it holds, and more often than not, large rollouts like this inevitably resulted in some documents being left behind.

Zac and David almost tripped over each other to answer, with Zac winning the silent split second battle to speak.

"We have completed a full study, understand the complexities and know where data lies inside and outside of the actual documents." Zac began. "We know what tools we need, including grabbing your data from drawings where much of it sits, and have a clear plan to set those up in plenty of time for the data loading to be tested and validated."

"Good." I said, nodding.

"We're not going to tell you there won't be some bumps in the road, but we have a plan and are prepared to navigate through them." David added.





“Excellent. That was what I wanted to hear.” I said. And, honestly these remarks as small as they may seem went a long way to reassuring me.

Just after a team lunch, during which we had exchanged jokes about marzipan and marmalade for some bizarre reason, the guys from Creideas were off to get started on the implementation.



# VALIDATION

“Ok, so we’re running off track a little” David began. It was now 4 weeks later and we’re already well into our implementation. We were currently at the stage of configuring some workflows to better meet our needs than the standard solution provided.

“So, what can we do to remedy this David?” asked Derek. This was only the second weekly project meeting I had attended but I could see a change in Derek. He seemed to be far friendlier with David and the team than he ever was with me.

“Well, we have some time to claw back here and there” David was pointing out some activities in the schedule being projected, “but I still think we might be a little over. We all spent a bit longer than expected working through the various numbering schemas and workflow processes we uncovered.”

“Ok, so this is probably going to cost us more money than I guess?” I had to ask.

“Possibly” said both Derek and David almost in unison.

Derek continued. “These things always happen boss, on every project, whatever that project is. But it’s about managing it. The numbering and workflows were far less understood than we thought. They are critical to our solution so they had to be right. So yes, it might mean we need to go back to the honey pot, but it’s too early to tell for sure.”

“We will flag this as a risk and as soon as we feel we are never going to recover we will raise a hand” David added.

“Which so far, hasn’t had to be done.” continued Derek. “It’s about us working as a team and being open that allows us to manage this together.”

Well, you could have knocked me over with a feather, as the saying goes. Derek. My Derek. THE Derek, sitting here in front of me, being reasonable and creative. Wow!

“I have a couple of ideas that I’d like to talk to your teams about related to these pieces.”



Zac was now talking, "and to revalidate our original thinking."

"Wait a minute; does this mean we've agreed on the wrong approach?" I asked. I wish I had not asked that to be honest, because the faces on everyone in the room suggested that I sounded like a crazy man.

"Best laid plans and all that. I mean, if we got it wrong or things have changed, let's just regroup, discuss and move on. We should never feel constrained to stick to any plan or design that no longer works." Zac replied sincerely without making me feel stupid.

"Don't worry Fred, we'll only do what is right" came in Derek. I could still not believe the change in Derek.

"I'm relaxed, I'm cool. Great stuff." Words that Shaggy would have said, not Fred.

The project to create our solution was actually not as drawn out as I had expected. With a clear plan we got there, albeit with some bumps and deviations along the way. Derek was all over it and could answer any questions I or Anne had whenever we raised them. Confidence was high.

And then there's Ken. "This doesn't work, it's just rubbish!" he said.

Ok, so our confidence was high, but it can take a dip when the first users get their mitts on it. Ken, one of our most senior engineers was part of a twenty strong team of people providing us the first wave of user acceptance.

Ken was what I would call old school. If it was not on paper, it didn't exist. If you sent him an email you had to call him to tell him to look at it. Nothing wrong in that in itself, but not entirely conducive to a successful computer based document management system either.



"That's ok Ken, let me see if I can step you through it". This was Kathy. Kathy worked for Creideas and was supporting our test sessions. Zac was in the wings but Kathy was the one supporting the room. She was introduced as a document control lead, someone that really knew the business. And it was clear to me that she had used the system, not just looked at it.

Kathy had to have the patience of a saint. Ken was one of a few that had the ability to press buttons that should never be pressed. To her credit, Kathy stayed calm and walked each of them through the scripts slowly until they could eventually perform the steps alone.

"It takes time I know, but this is not just about testing the system works of course; it's equally about bringing people along for the ride." Kathy explained to me at the coffee machine. I drank way too much coffee but it was often the meeting place of choice for a five-minute break.

Kathy continued. "I've seen this a hundred times, but you watch, it will be Ken who will be raising ideas and improvements in no time at all."

"Right." I said, "I'd be happy if you could just get him

to logon at this point, getting him to embrace it would be a minor miracle."

"But you, and I, have so much invested in this project, we have to make it work. This is normal, its change. You just can't assume everyone accepts it at the same pace. If we were to introduce a new system that did your ironing or made dinner, some would embrace it quickly and for some acceptance would take longer." she replied clearly showing her passion. Kathy was very personable and I could see why she was a good choice for this type of session. All too often I have seen technical folks perform this role only to confuse and complicate everything.

I was also part of the acceptance testing, something Derek had suggested actually. It felt good to be honest, seeing what we'd been working towards and what it could mean for us in our day to day operations. Of course, it also meant I could talk more confidently about its capabilities to Reggie. He did have a tendency to jump into the minutia.

"Could we change that column heading to say something else you think?" asked Ken. Kathy 1. Fred 0.



## CHAPTER SEVEN

# MANAGEMENT

We managed to get through the past few months with no further incidents at work and we also managed to get Phase One of our grand vision up and running.

I won't pretend it was easy, but it was worth it. We already have the majority of users in both Projects and Operations accessing a single system, which has been something of an awakening for all.

We still have our friends over at Creideas involved day to day, providing us Document Control and CAD drafting resources to help clear backlogs of work and offering general support to the users. That's proved to be far more beneficial than I had ever imagined. It is not necessarily deep technical people that provide the best support to new users, actually it's quite the opposite. We needed people that knew the business, our business, and of course the solution. Hard to find you would think, but not for us as it turned out. We were fortunate.

Today we have a meeting to revisit the vision and make sure what we have deployed stays active and looked after.

I was waved right through the main gates, one of the benefits of a low turnover in security staff is that all the guards know me. It is nice to be recognized.



Reggie had called a meeting for an update. Since things were going so well, I was feeling pretty confident as I walked into the board room.

"Hi Fred, take a seat, and we'll get started" Reggie was already in the room as was everyone else. Great start I thought.

"Sorry I'm late" was my impulsive response. The fact was, I was two minutes early but I thought better of making a big deal of it. After all, who cares about two minutes?

"So, give me the lowdown folks, I hear things are on their way up." Reggie said.

Anne spoke first. "Well Reggie, the team has done a tremendous job. They have addressed the main problems and root cause of the incident earlier this year, rolling out a new document management system with relatively very few issues. I have to say, even I am impressed."

"Good stuff. Fred?" says Reggie.

"Yes Reggie, I agree with Anne. We have had very few issues along the way and together we worked those out as they came up."

In most of my recent meetings with Reggie I tended to answer his questions succinctly with no elaboration. I was mindful of providing too much information when it was not necessary. But this day, I felt the urge to expand.

"Within operations things are already much improved. We have new tools that let us compare revisions of drawings and check what has or has not changed, something that was historically manual for us. We can quickly identify all safety, shutdown and start-up documentation, and see if any are outdated, under change or just missing. And we also now have solid links between the maintenance work orders and the correct documentation." I said, making no effort to hide my genuine enthusiasm.

"From a projects perspective, we can now see exactly how we are performing and tracking against deliverables. We can even see where our vendors are not providing us timely responses and updates as they are supposed to. We will see significant benefits on Raleigh. When that project starts next month, it will immediately reap the benefits of all of this from day one."



"Ok, so everyone is happy? What next?" Reggie was showing clear signs of satisfaction and agreement.

Zac, who was very much a part of this team and the Viddaco family and present at this meeting, took the opportunity to speak, "Hi all, I too am pleased with where we are and what we have done so far, but let's keep focussed on maintaining this success now, and talk about whether we continue on to the larger vision now or later."

"Absolutely", said Reggie, "expand please Zac" asked Reggie.

Zac obliged, "Sure. In terms of maintaining what we have now, we have put all the support and maintenance in place for users and systems, although I suggest some level of auditing of the processes is done by you periodically. This will allow you to see if they are being used properly and if not, why not."

"There are still some outstanding requirements that weren't covered in Phase One. We will need a session to discuss and either park them further or consider a plan to deploy.

And, I would like to spend time with end users in the New Year, just to see how they are finding the system. Quite often usage of a system drops without you knowing it, so let's keep on top of it and make sure that any issues or negativity is identified and addressed as quickly as possible."

"Good ideas" I added. I felt the need to say something, but this seemed enough.

"These are all things you need to look at internally for the long term too." continued Zac, "So you can ensure stability and reliance for the long term. Of course we're here if you want us to be."

"Yes indeed Zac, I completely agree. I would like us to be self-sufficient and bring your folks in where it makes sense. From all accounts, I understand that we couldn't have done this without Creideas" Reggie proclaimed.

"Absolutely" said Anne and I together.

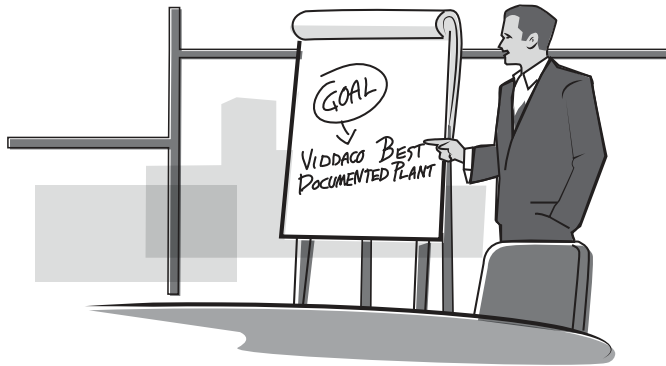
"Well it's clear that your vision was aligned with ours and that is, in large part, what lead to this success."



"Your vision?" Reggie pressed.

"Our vision is for you to achieve the state of Best Documented Plant." Zac responded.

Zac and I had discussed this several times over lunch during the past weeks. It was something I had been driving through our teams as a common goal and for some, as a personal objective. The concept was as simple as the words suggest. Best Documented Plant. We want our plant to be considered fully documented and have the capability to prove it.



"Ah yes." Reggie was of course aware of this, I had made no secret of it, spreading this across every company bulletin and communication I saw fit. "I thought such an accolade would be very difficult to achieve just a few months ago, but I am pleased to say I was wrong."

"It is difficult Reggie." I verified. "But it's achievable and rewarding for all of us at Viddaco."

At that and after agreeing on a follow-up sessions to discuss plans for Phase Two and properly maintaining what we had in place, the meeting drew to a close.





## SHARING SUCCESS

"Hi Anne, how are you today?" I asked

"Great. I have another company coming in to see me today; would you like to meet them?" She asked in reply.

"Sure, what's the deal? Do they compete with us?"

"Well, maybe but only in a small way and they operate outside our geography. Anyway, they are here to listen to our story about the systems we put in place."

"Ok, what are they looking for?" I had a busy day ahead, so wasn't overly keen to waste several hours talking to these folks.

"Well, remember way back when I said to you, I know someone. How do you think I knew about them?" she prompted.

"Ah, so you want to tell them how good the folks at Creideas were for us?"

"I do. And so should you. They deserve it, don't you think?"

"I absolutely do. Lead the way." I said.

Three years later and the system remains solidly in place. We completed Phase Two AND Phase Three, expanding the document management system into our other maintenance systems and across our other plants as well. We have a strong set of processes, driven by the software that some users find boring, but they work.

I hope we have no further incidents, particularly for the safety of my colleagues and everyone else, but also for the validation of our new found systems and solutions.

The trust we put in Creideas was critical in realizing the success we have today; success that I am sure we would not have achieved without them.



We hope you found this story engaging and enlightening. Perhaps you are wondering why it was written.

**Well, think of it as a Business Fable, a story based on real business challenges, meant to share a typical journey already taken by many organizations and one that will be taken by many more, perhaps even yours.**

While all the characters' names are fictitious, the events and actions are based on actual experiences had by clients of Kinsmen Group. We felt it useful to provide a story that walked you through various experiences and challenges we all work with every day so you know you are not alone. So you know that we have the knowledge and expertise to be a trusted partner in your journey.

Perhaps you are wondering where the name Creideas came from. If you research the English meaning of this Gaelic word you will find that is synonymous with trustworthiness, reliability, faith, credence and credibility.

To us and to our clients it is synonymous with Kinsmen Group.

Fred, the Operations Director, now works with us, sharing his experiences and passion to solve these types of problems with us and our clients.

Zac and David still work with us of course, and will continue to bring real value and experience to our customers across the globe.

Anne, Derek, Duncan and Sarah are all people we have encountered and had the privilege of working with over many years. They may see the connection on reading this but we'll never disclose who is who.

Reggie is just, well Reggie. We can't honestly say he was based on anyone.

Read more about us at <http://www.kinsmengroup.com> and find why we should be your next trusted partner.



## ABOUT THE AUTHOR

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**Paul Cheetham** is VP of Solution Delivery & Support at Kinsmen Group, responsible for the complete delivery lifecycle of services and solutions from initial design through ongoing support. Paul has a depth of experience in addressing business issues in asset intensive industries, including Oil and Gas, Energy, Utilities and Pharmaceutical, through several key roles held in British Nuclear Fuels and McLaren Software spanning over 20 years.

Paul has always maintained the ability to understand customers expectations better through his hands on approach. He has helped many leading organizations including Apache Corporation, TAQA, Holcim, ConocoPhillips, Canadian Natural Resources, EDF Energy, Noble Energy, Grünenthal, CH2M Hill, Aker Kvaerner, Cenovus, Weyerhaeuser and many more.





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