Work Management: Indicators of Success, Failure, and Adoption

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Project Summary

Goals & Objectives

- Partner with Performance Consultants Associates (PCA) to assist with assessment, preparation, and implementation of work management model

- Partner with Prosci to assist with assessment, preparation, and implementation of Change Management plan

- Implement Work Management best practices for work identification, planning, and scheduling in all areas
  - Standardize job descriptions, roles, responsibilities
  - Develop and communicate RACI chart
  - Develop detailed process map, including where it integrates with other mill activities
  - Implement standard requirements on job planning detail including standard templates
  - Implement standard requirements on work order approvals, break-in approvals, WO planning and execution prioritization
  - Provide training to all employees

- Modify SAP tables in notification and work order modules to align with strategy and support KPIs

- Compile 3 years of completed WO data to perform gap analysis on coding, planning efficiency, and work order closure and feedback
# Project Summary

## Locations in Scope

- **Mill 1** - 1000 employees, 6 departments
  - Power
  - Recovery
  - Pulp Mill
  - Paper Machines (3)
  - Board Machine
  - Extruders (3)

- **Mill 2** - 800 employees, 5 departments
  - Power
  - Recovery
  - Pulp Mill
  - Paper Machine
  - Extruders (4)

## Timeline

- Mill 1 Project Kick-Off June 2021
- Mill 2 Project Kick-Off January 2022
- Mill 1 Project Close August 2022
- Mill 2 Project Close December 2022

**Notes:**

- Work Order data for gap analysis and adoption metrics January 2019-December 2022
- A planning and scheduling improvement effort of smaller scope had been underway between 2020 & 2021
Change Management Strategy

Phase 1: Prepare Approach

Define Success
- Align on 4Ps (Project, Purpose, Particulars, People)
- Conduct initial PCT

Define Impact
- Conduct Impact Assessment
- Identify Adoption Metrics

Define Approach
- Conduct Risk Assessment
- Identify anticipated resistance
- Capture Change Strategy/Plan for Sub-Projects
- Shift Repair Utilization
- Outage Planning
- Work Audit Audit
## Change Management Strategy

### Phase 2: Manage Change

#### Plan & Act
- Develop ADKAR blueprint
- Develop Sponsor/ People Leader/ Comms Plan for overall project
- Create leader/sponsor communications
- Identify tasks/ activities to include in the Overall Sponsor Project Checklist
- Create Employee Awareness Communications
- Create talking points
- Create FAQs
- Draft union communications
- Develop change cheat sheet
- Develop training plan
- Develop Managers roles & resp deck
- Develop Supervisors roles & resp deck

#### Track Performance
- Conduct ADKAR survey
- Conduct 2nd PCT assessment
## Change Management Strategy

### Phase 3: Sustain Outcomes

<table>
<thead>
<tr>
<th>Review Performance</th>
<th>Activate Sustainment</th>
<th>Transfer Ownership</th>
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<tbody>
<tr>
<td>• Measure adoption</td>
<td>• Identify and implement resistance tactics</td>
<td>• Provide input on Transition Plan</td>
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<tr>
<td>• Execute work order audit process</td>
<td>• Identify tasks for Sponsor Reinforcement Checklist</td>
<td>• Provide recommendations to sponsors and people leaders</td>
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<td>• Review adoption metrics in project close</td>
<td></td>
<td>• Conduct individual area survey</td>
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<tr>
<td>• Provide view of change management performance over time</td>
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<td>• Project close</td>
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Change Readiness
Prosci Change Triangle (PCT)

### Leadership/Sponsorship
- **20**

### Success
- **27**

### Project Management
- **28**
- **22**

### Change Management

#### Factor: Priorities are set and communicated regarding the change and other competing priorities.
- **Score: 1**

#### Factor: The primary sponsor is resolving issues and making decisions related to the project schedule, scope, and resources.
- **Score: 1**

#### Factor: The primary sponsor is actively and visibly participating throughout the lifecycle of the change.
- **Score: 1**

#### Factor: The primary sponsor is visibly reinforcing the change by celebrating successes and addressing resistance.
- **Score: 1**

### Activities to Strengthen Factor

- Build your primary sponsor’s awareness of the importance of their role in celebrating successes and addressing resistance. Review the Best Practices Research to find the information that you believe would be most influential with your primary sponsor.

- Select activities to include in your sponsor plan that will enable your primary sponsor to visibly reinforce the change. Examples of activities include:
  - Recognize the achievement of significant project milestones
  - Look for quick wins; share successes and build enthusiasm for the change
  - Celebrate success stories in person; be present and visible
  - Acknowledge challenges and obstacles
  - Enforce application of new processes and behaviors

- Review the sponsor plan with your primary sponsor and make any necessary revisions/additions to obtain their approval of the plan.

- Meet regularly with your primary sponsor to monitor and support their progress in completing the actions in the sponsor plan. If required, identify and recommend adaptive actions for your primary sponsor to complete. Provide coaching to enable them to become more effective in their role.

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**Consequences of a Low Score**

If your primary sponsor scored low on this factor, some of the negative consequences include:

- Resistance to the change may increase after implementation.
- Impacted people may revert to previous behaviors.
- Impacted people may revert to using old processes or tools or develop workarounds to avoid adopting a change.
- In some cases the change may slip away over a period of time, as impacted people do not believe the change was really important or that anyone noticed their work.
- Impacted people may view this change as the ‘flavor of the month’. This will contribute to creating a negative history of past change and compromise the organization’s ability to implement future changes.
Adoption Metrics
More work is being identified and approved...

- We saw an increase from year 2 with a monthly average of 966 work notifications written and approved to year 4 with a monthly average of 1,640 work notifications written and approved.
- The High Adopter Area improved from year 2 to year 4 by 43% more corrective work being identified and approved each month.
- The Low Adopter Area only saw a 22% improvement from year 2 to year 4.
Quality of planning has improved...

% PLND with Labor Estimates by Year

- % of planned & completed corrective work with labor steps on the work order improved from 29% to 76% from year 2 to 4.
More work is being planned...

- Graph shows work orders completed by year with User Status of "PLND" or "SCHD" with labor steps on the WO
- The High Adopter Area improved from year 2 to year 4 by 208%
- The Low Adopter Area improved from year 2 to 3 by 25%, but then backslid to year 2 levels in year 4
Corrective work orders completed by year shows a 45% increase from year 2 to year 4.

In one Low Adopter Area we saw a 21% improvement from year 2 to year 3. Due to a restructure, there was a sponsorship change that resulted in a 27% decline from years 3 to 4; this was also 14% lower than their performance in year 2.

In the High Adopter area, we saw a 50% increase in corrective work orders completed from year 2 to year 4.
Work is being processed and completed faster...

- Graph shows 67% reduction in average duration from the time a work notification is entered, until the job is completed from year 1 to year 4.
- This shows great improvement in prioritizing work, getting it processed, and closed out in the system.
Outage Coordination Improved in Areas that Adopted Change

- Graph shows area scheduled outage durations versus their pre-implementation averages. We saw improvements in most areas on reducing outage duration.
- The High Adopter Area showed a 13% decrease in average outage duration.
- The Low Adopter Area showed no improvement pre vs post implementation.
Improvement Variance Between High and Low Adopter Areas

- Radar graph shows the overall improvement differences between our high adopter area and our lowest overall adopter area. These differences are as measured pre vs post implementation.

- The high adopter area outperformed the low adopter area in all aspects of the work management model except for work prioritization.
Variations Between High and Low Adopters
Low Adopter vs. High Adopter Area Self Reviews

**Does your team utilize the priority matrix to assign the appropriate priority to work?**

- **Low Adopter Area**: 0%
- **High Adopter Area**: 10%

**Does your area hold core meetings consistently?**

- **Low Adopter Area**: 30%
- **High Adopter Area**: 70%

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What are the benefits you have seen from the project so far?

- **Less break-in & emergency work**: 50%
- **Communication is better**: 40%
- **We are less reactive**: 50%
- **Quality of life has improved**: 60%
- **Teamwork has improved**: 70%
- **More work is getting accomplished**: 80%

- **High Adopter Area**
- **Low Adopter Area**
Why the drastic variations between departments?

- Same Project Managers
- Same Consultants
- Same Executive Sponsors
- Same Communications
- Same Training
- Same Resources
- Same External Challenges
- Same Internal Challenges
- Same Metrics
- Same High-Level Expectations
- Same Project Scope
- Same Sustainability Plan
- Same Business Hand-Off

Different Department Level Sponsorship

Most Changes Require More Than Just a Primary Sponsor
PCT, Before and After

- Project Management remained strong throughout the implementation
- Change Management practices greatly improved throughout the implementation
- Sponsorship showed some improvement, but remains the biggest risk to program success
Even Low Adopter areas saw an initial improvement. However, this improvement dwindled as constant oversight by the project team decreased.

High Adopter areas continue to see incremental improvement without oversight from the project team. These areas have entered Sustainability!

Changes in departmental leadership drastically affected the rate of improvement or lack thereof.

Areas that started with strong sponsorship and reached sustainability were less likely to backslide even when a weaker sponsor was moved to the department.

Overall the project was deemed a success, but the adoptions metrics tell us areas of risk remain, which threatens the overall sustainability of the program.

The strongest project sponsors weren’t always the designated Department Managers - Champions emerged at all levels, however this was more likely to happen in departments with strong leadership.

Conclusion: Strong project management and planning is unlikely to overcome unaddressed gaps in sponsorship. Spend the time at the beginning to build a strong coalition, and keep it alive as the organization changes.
Open Discussion
SHOUT OUT to those who were instrumental in making this a successful project!

Pactiv Evergreen Project Team
Portfolio Manager: Cassie Nail

Project Managers: Austin Harvie, Bret Dean, & Jesse Pearson

SAP Gurus: Rob Boutwell, Patience Scott, & Tommy Green

Not pictured: Department Leaders, Planners, Supervisors, OMCs, & Technicians

Work Management SMEs, Coaching, and Project Support: Dan Moss, Bruce Hawkins, Glynn Thorman

Change Management SMEs, Coaching and Project Support: Josh Garside, Julie Rohmer

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