Northern California Chapter / Bay Area Meeting
Monthly Meeting Agenda
August 8, 2018

1. Mixer Time
2. Self-Introductions
3. Main Topic: **How to Facilitate a Pull Plan to Help Meet Owner Expectations**
4. Key Takeaways and Questions
5. Training Opportunities and Upcoming Events
6. Plus/Delta
How to Facilitate a Pull Plan to Help Meet Owner Expectations

5:00 to 5:15 – Mixer
5:15 to 5:30 – Self-Introductions
5:30 to 6:45 – Feature Presentation
6:45 to 6:55 – Key Takeaways & Questions
6:55 to 7:00 – Closing Remarks & Plus/Delta
Facilitate a Pull Plan to Help Meet Owner Expectations

Dave Hagan & Sabrina Odah
August 8, 2018
Today’s Objectives

- Identify and meet customer expectations for planning deliverables
- Leverage pull planning during different phases of a project
- Properly prepare for a productive pull planning session
- Increase engagement of & build accountability in pull planning participants
Pull Planning – General Guidelines

- Understand the COS
- Use pull planning for each level of planning
- Define facilitation roles & responsibilities
- Limit duration to 4 hours max.
- Set time expectations
- Identify a neutral facilitator
Pull Planning – Preparation

- Identify Last Planners who should attend
- Send invite at least 1 week in advance
- Distribute preparation & expectations guidelines
- Collect supporting content: Plans, specifications, BIM, project goals
Pull Planning – Materials Needed

- Sticky notes
- Sharpies
- Plotter paper / whiteboard
- Flip chart (Plus / Delta, Parking Lot)
- CDs: Plans, specs, elevations
- Project Info: BIM, milestone schedule, estimates
- Option: Snacks & refreshments!
Set Up the Room for Success

- Remove barriers to entry – encourage people to engage!
- Ensure clear wall space
- Clear chairs and desks from vicinity of wall
Set the Tone

- Confirm attendance
- Ask all attendees to provide self-introduction
- Set the Ground Rules
- Review the Goals
- Create a Parking Lot for items to discuss later
Set the Ground Rules

- **This is a safe place!**
- Be prepared to back up opinions
- Listen with the intent to learn
- Do not interrupt
- Say what you want to say
  - Offer it in good faith for learning
- No electronic devices!
Review the Goals

- Produce a list of action items to complete
- Identify hand-offs & sequence them correctly
- Identify one Accountable Person for each task & request
- Define realistic, unbuffered durations for tasks
- Identify & resolve disagreements
Create a Safe Environment

- “No” is an acceptable answer
  - Turn “No” to “Yes if” to “Yes”
- Work towards solutions that are best for the project
- Use a positive tone & energy to keep the session progressing
Create a Safe Environment

- Advocate for all team members
- Step out of Facilitator role if unable to stay neutral
- Be mindful of what you say with words & body language
Gain Alignment

- Align around work area descriptions & build common language
- Remind team of agreed on Conditions of Satisfaction
- Use supporting visuals
Ask Guiding Questions

- What do you need to complete this work?
- What challenges can you foresee?
- What opportunities do you see?
- Whose help do you need?
- Consider safety concerns, quality issues, long lead items
Start the Conversation

- Discuss risks & opportunities associated with the work
- Transform the discussion to action-oriented tasks
  - Request Last Planners to capture own tasks
- Encourage use of graphics, visuals, documents, sketches
Capture Tasks

- Identify one Accountable Person
- Describe task: Hand-off provided to downstream customer
- Determine duration (days)
- Determine quantity of people required for task
- Post an example
- Identify intermediate milestones
- Determine when to bring in consultants
- Consider overlap of design & construction
- Prioritize & develop plan to remove constraints
Identify Constraints

- Missing information
- Incomplete documentation
- Lack of clear process
- Lack of understanding of output
- Incomplete make ready work
- Unscheduled 3rd party tests, formal agency inspections
- Anticipated defects
Formalize the Plan

- Integrate in project schedule
- Ensure plan is on track with latest information
- Gather reliable promises & ensure all team members buy-in
- Distribute to all attendees
- Do **not** change the plan in a silo after the pull plan concludes
Conclude the Session

- Note: Plan can change
- Challenge team to track reliability, identify improvements & reduce variance
- Revisit Parking Lot items
- Set time & place to review plan
- Were any key players missing?
- Plus / Delta
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LIGHTNING ROUND

1st Round – Key Takeaways

2nd Round – Questions
Join LCI

Annual Membership Costs

- Corporate: $7,500 (National) / $5,000 (Regional, <50 employees)
- Vendor Membership: $7,500
  Law Firm / CPA Membership: $3,000
- Individual: $250 per year
- Academic: $75 (Faculty) / $50 (Student)

Benefits

- Listing on LCI website with contact information and link to member site
- Access to Members-Only Website for materials, forms, training materials etc.
- Reduced fees for LCI Seminars, Workshops and Research Meetings.

For additional benefits, information and to sign up, go to: [WWW.LEANCONSTRUCTION.ORG](http://WWW.LEANCONSTRUCTION.ORG)
Transforming Design and Construction: A Framework for Change

WILLIAM R. (BILL) SEED, Executive Editor

A diverse set of contributors have collaborated to create this Framework for Learning based on the transformative projects and experiences of their Lean practices. They span the breadth of the industry: owners, designers, builders, specialty contractors, educators and consultants. The papers, presented in chapter format, are intended to encourage discussion, learning and experimentation. They alone will not offer sufficient knowledge to implement all of these concepts. They will, however, help direct readers further along their learning journey.

Pricing (up to 6 copies):*
Non-member: $53/ea.
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LCI Books Available for Order

**LCI Special Edition: This Is Lean**

NIKLAS MODIG & PÄR ÅHLSTRÖM

This is Lean gives an easily accessible, structured, and inspiring account and description of Lean. Most important perhaps is the value and effect of the joint development of the whole organization, and the structured way of working from co-workers to executives. Here are enormous benefits to gain — both for co-workers, for the company and organization, and not the least for the customer.

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Target Value Delivery: Practitioner Guidebook to Implementation – Current State 2016
Kristin Hill, Katherine Copeland and Christian Pikel
As the second edition in LCI’s *Transforming Design & Construction* series, this manual, written by a team of over 20 Target Value Design practitioners, is made to provide readers with a “how to” of TVD in real projects.

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**Bulk discounts (for corporate members only):**
Please contact Julia Shellhouse
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REMINDERS & FYIs

Learning Program

• Last Planner
  • September
• Target Value Design
  • November

Monthly Meeting program

• September 12, Bay Area, LCI/AIA Joint Event – Lean Construction for Architects
  • Panelist from Sutter Health, UCSF, HGA and HDR will discuss impacts of design and use of Lean concepts and tools for Architects
• September 12, Central Valley, AIA/DBIA Event
  • Bill Proctor will discuss extending lean practice into the early concept phase of complex capital projects and completing the design process
• Combined meeting in Walnut Creek Jan, Apr, Jul & Nov, 5:30pm-8:30pm
• Separate Bay Area and Central Valley meetings the 2nd Wed of the month 5pm-7pm Feb, Mar, May, Jun, Aug & Sep
WRAP UP

Plus / Delta - Feedback to improve meeting

Thanks!
Adjourned – Drive Injury Free

Don’t Forget to Join LCI and LCI NorCal on LinkedIn}

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