Implementing the Collaborative Planning System

How the experts implement the Collaborative Planning System

The Collaborative Planning System in design (single projects):

- **Collaborative Mapping**: Map the entire process or up to the next key milestone
- **Weekly Work Plans**: Commit to actions and measure the team’s commitments
- **Make Ready**: Make transparent the constraints and plan mitigating actions
- **Standard Processes**: Standardise a repetitive approach
- **Data Analysis and Performance Improvement**: Analyse and improve

**Step 1**: Collaboratively map the design process, or elements of it, so the team understands the target and the steps to deliver it.

**Step 2**: Get the team into the Plan-Do-Check-Act cycle and the use of Weekly Work Plans. Capture reliability (PPC) and reasons analysis measurements. Use Weekly Work Plans process to drive adherence to the agreed look ahead.

**Step 3**: Introduce the Make Ready process to ensure that the constraints to achieving the tasks are removed to allow reliable task commitment.

**Step 4**: Develop and implement standard processes for repetitive design processes

**Step 5**: At the appropriate point undertake Data Analysis using the generated data and metrics (PPC and Reason for Non completion) as a solid guide as to where to start process improvement efforts.

General: Make metrics transparent at earliest, sensible opportunity
Why do it this way?

- Design team’s get an enormous amount of value from the collaborative mapping process – as it gives them the opportunity to creatively plan whilst understanding their interfaces with all the key stakeholders – both design and otherwise.

- Design team’s conversely perceive that they get less value from the weekly work plan process. However, in the expert’s experience the ability to enforce reliable commitment promises brings significant benefits.

- This method gets designers engaged in the process and allows production control to be introduced with the least resistance.

Hence, the implementation sequence is:

**Do Collaborative Mapping > Do Work Plans > Do Make Ready**
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How the experts implement the Collaborative Planning System

The **Collaborative Planning System** in construction and small design projects:

Step 1: Get the team into the Plan-Do-Check-Act cycle and the use of **Daily Work Plans**. Capture reliability (PPC) and reasons analysis measurements.

Step 2: Introduce the **Make Ready** process to ensure that the constraints to achieving the tasks are removed to allow reliable task commitment.

Step 3: Use **Collaborative Mapping**, or elements of it, so the team understand the target and the steps to deliver it.

Step 4: Develop and implement standard processes for repetitive design processes

Step 5: At the appropriate point undertake **Data Analysis** using the generated data and metrics (PPC and Reason for Non completion) as a solid guide as to where to start process improvement efforts.

General: Make metrics transparent at earliest, sensible opportunity
Why do it this way?

- Usually the biggest, quickest impact can be made by working with these teams on the detailed work plans - it is where the main resource is deployed and money spent.

- Site teams get most benefit from resolving immediate issues and working out to the medium term.

- Getting the team engaged early by working on issues that can be quickly solved is always preferable.

- Consequently if the team can make better commitments, understand transparent interfaces and plan more collaboratively, big benefits can be apparent quickly.

- In our experience the team must improve its short term planning reliability to have a chance of predictably delivering a collaboratively mapped plan.

Hence the implementation sequence is:

**Do Work Plans > Do Make Ready > Do Collaborative Mapping**