



Professional Services Supporting Lean Design and Construction/Integrated Project Delivery

The broad application of Lean principles, systems, processes and tools to design and construction, as well as Integrated Project Delivery (IPD) are now being broadly adopted in Canada.

Brian and *Strategies 4 Impact!* have developed a comprehensive suite of services to support owners, designers and contractors:

- applying Lean to any project delivery model
- implementing IPD on their projects
- applying Lean to IPD projects

These services are founded on our several years of investment in research and learning, tracking the evolution of Lean and IPD in the U.S., participating in conferences, and gaining experience on projects in the U.S. and Canada.

Our Professional Services are Uniquely Tailored to Deliver Greatest Value to Each of Our Clients

Strategies 4 Impact! designs our professional services for each, individual assignment. We carefully select from our extensive menu of service offerings to find the coordinated and comprehensive blend of services that will best serve the needs of each of our clients.

That set of services that will deliver greatest value to the circumstances of that specific client.

And when we don't already have a professional service to fit the need, we create it!

Just as with all of our other professional services, we don't even consider delivering 'one size fits all' solutions. (*Brian often suggests that we take this unique approach because he is an architect!*)

Our customized professional services are founded on the principles, systems, processes and tools that are well-proven in Lean and IPD projects, adopting and adapting them to the circumstances of each project.

Education

We've learned that it is critical to create a solid foundation for our Lean and IPD journey.

We usually invest a day or two leading a group through critical areas of knowledge and learning, *including*:

- Why are Owners and Industry looking for a better way to deliver value – quality design and build, faster and at less cost?
- What are the key principles that underpin Lean?
- What are the benefits of collaboration and why is it a foundational principle in Lean and IPD?



- What is the importance of maintaining continuous, uninterrupted process flow in Lean and what are the benefits?
- How have designers and builders been attempting to adapt Lean to design and construction of building and infrastructure projects?
- How have project teams been attempting to empower collaboration and integration on infrastructure projects to build the team's knowledge base quickly and optimize the benefit from engaging the expertise of designers, users, contractors, trades and suppliers early in the project? This has led to the evolution of Integrated Project Delivery including integrated/multi-party contract forms.
- What do those integrated forms of contract look like? Who are the parties? How do you add new parties to these contracts?
- How has the industry learned to combine the benefits of Lean with Integrated Project Delivery? What are those benefits?
- Specifically how do the parties share risk and reward?
- What are some of the key systems, processes and tools used in Lean and IPD to deliver greater value? This provides an overview that demonstrates the range of proven systems and tools that are already available to Lean and IPD Project Teams.
- What are some approaches to procurement seen on public and private projects when Lean and IPD are being used?

Training

Intensive training provides teams with in-depth knowledge of the many systems, processes and tools that are available in Lean and IPD. This training builds on the foundation established through our Education services. This training helps teams understand in detail how these systems and tools work, and, importantly how to put them to work on their projects. We provide thorough, state-of-the-art training on a full range of topics *including*:

- Last Planner® System
- Target Value Design
- Creating and Leading Effective and Productive Big Rooms
- Co-location and Collaboration
- Building out the Team and Effective On-boarding Processes
- A3s as Decision-making and Record-keeping tools
- Decisions at the Last Responsible Moment
- Optimizing the Value of BIM in IPD
- Prefabrication and Modularization
- Choosing by Advantages
- Contracts for IPD, including the new CCDC 30 in Canada
- Project Governance for IPD
- Responding to Procurement Documents with Winning Proposals



Last Planner® System

Facilitation and Coaching

Strategies 4 Impact! provides a full menu of professional services to facilitate the most successful Lean and IPD projects, *including*:

- Project “Kickoff” Workshop – two to three days including:
 - education and training for the Project Team
 - definition and validation of project objectives including Conditions of Satisfaction
 - initial project planning
 - identification of constraints that may impede the project
 - support in establishing project governance including Executive Management Team, Project Management Team, Clusters (Project Implementation Teams)
 - initial negotiations on contract and sharing of risk and reward
- Big Room facilitation, including simulations and facilitation of project planning by the full Project Team – Last Planner® System
 - Typically includes facilitation of initial Big Rooms, then educating and training individuals on the Project Team to undertake the facilitation role
- Facilitation of the Project Values Workshop to support the Project Team in identifying and validating 5 to 7 Project Values that will keep the Team focused and collaborating; guide all project decisions; and, drive the Team to the most successful project outcomes.
- Facilitation of regular “Circle Back” sessions in the Big Room to keep the Team focused, on plan and on track, and advise on “course corrections” that would add value to the project
- Facilitation of initial meetings of Project Management Team including advice on roles, responsibilities and agenda
- Fostering Team Collaboration, for example through team-building exercises and techniques



“Big Room” – Collaboration and Co-location

Advisory Services

Strategies 4 Impact! also provides professional services to support one of the lead parties on a project. While these services are directed to one of the parties, our objective is to provide knowledge and advice that leads to the best possible project outcomes.

This benefits the entire team – *truly* “win, win, win ...”.

Advisory Services can include elements of education, training, guidance, facilitation and coaching delivered to that party to the project and its own team.

Our experience providing this service shows that it is especially valued when that party’s ‘team within the Project Team’ can benefit from additional education, training and coaching. This can happen, for example, when team members haven’t accumulated a lot of experience in Lean and IPD.

Our services give team members the confidence and knowledge to fully collaborate and integrate with the Project Team.





Procurement

Procurement of design and construction services for Lean and IPD projects presents some unique challenges, especially on public projects.

Brian has extensive experience advising public and private sector owners on procurement of design and construction services.

Combining this with his expertise in Lean and IPD, he has provided valued advice to government owners as well as those in the private sector. This has included developing procurement strategies to comply with corporate or public purchasing protocols, assisting in drafting procurement documents, and evaluating the responses to those procurement documents.

Pursuit

Teams formed to pursue Lean and IPD project opportunities often include a Lean/IPD expert to support them in developing WINNING proposals.

The procurement documents may require a Lean/IPD expert on the team or the team may simply understand the value of tapping into the knowledge and expertise of an expert when developing their unique pursuit strategy and then preparing the proposal.

Clients of Strategies 4 Impact! that engage us to support pursuit of a Lean or IPD project benefit not just from Brian's knowledge and experience in Lean and IPD, but also from his widely-recognized and proven expertise as a strategist and writer.