Keynote Speaker

Why Execution Fails and What to Do About It

Introducing the DELTA FORCE model

Agenda

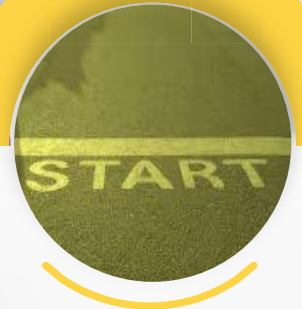| WHAT	WHY	DELTA	FORCE	START
What is DELTA FORCE ?	Why DELTA FORCE ?	DELTA Overview	FORCE Overview	Getting Started

Agenda

WHAT

What is DELTA FORCE ?

WHY

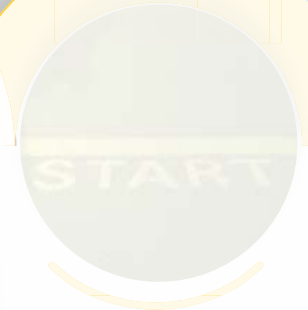Why DELTA FORCE ?

DELTA
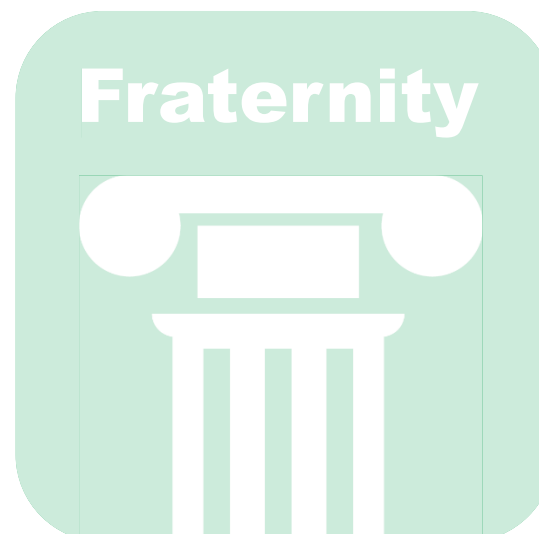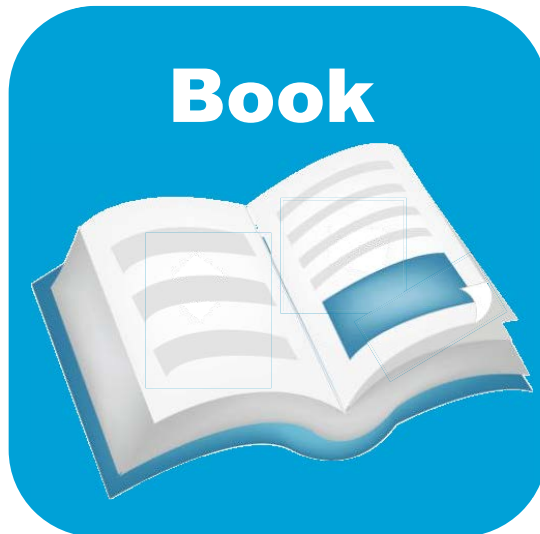
DELTA Overview

FORCE

FORCE Overview

START

Getting Started

What is DELTA FORCE?

What is DELTA FORCE?

5-Step Model for…

- Strategy Execution Excellence

- Initiative Implementation Success

- Change Management

- Strategy/Initiative Return on Investment (ROI)

- **Tips and Tricks**

Agenda
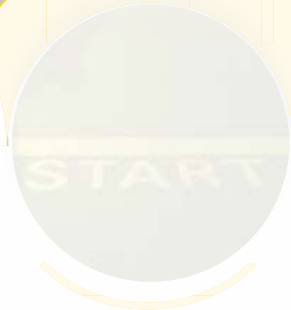
WHAT	WHY	DELTA	FORCE	START
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Why DELTA FORCE?

Why DELTA FORCE?

ANSWER 1 Survey Results

ANSWER 2 Award Winning Programs

Why DELTA FORCE?

ANSWER 1 Survey Results

ANSWER 2 Award Winning Programs
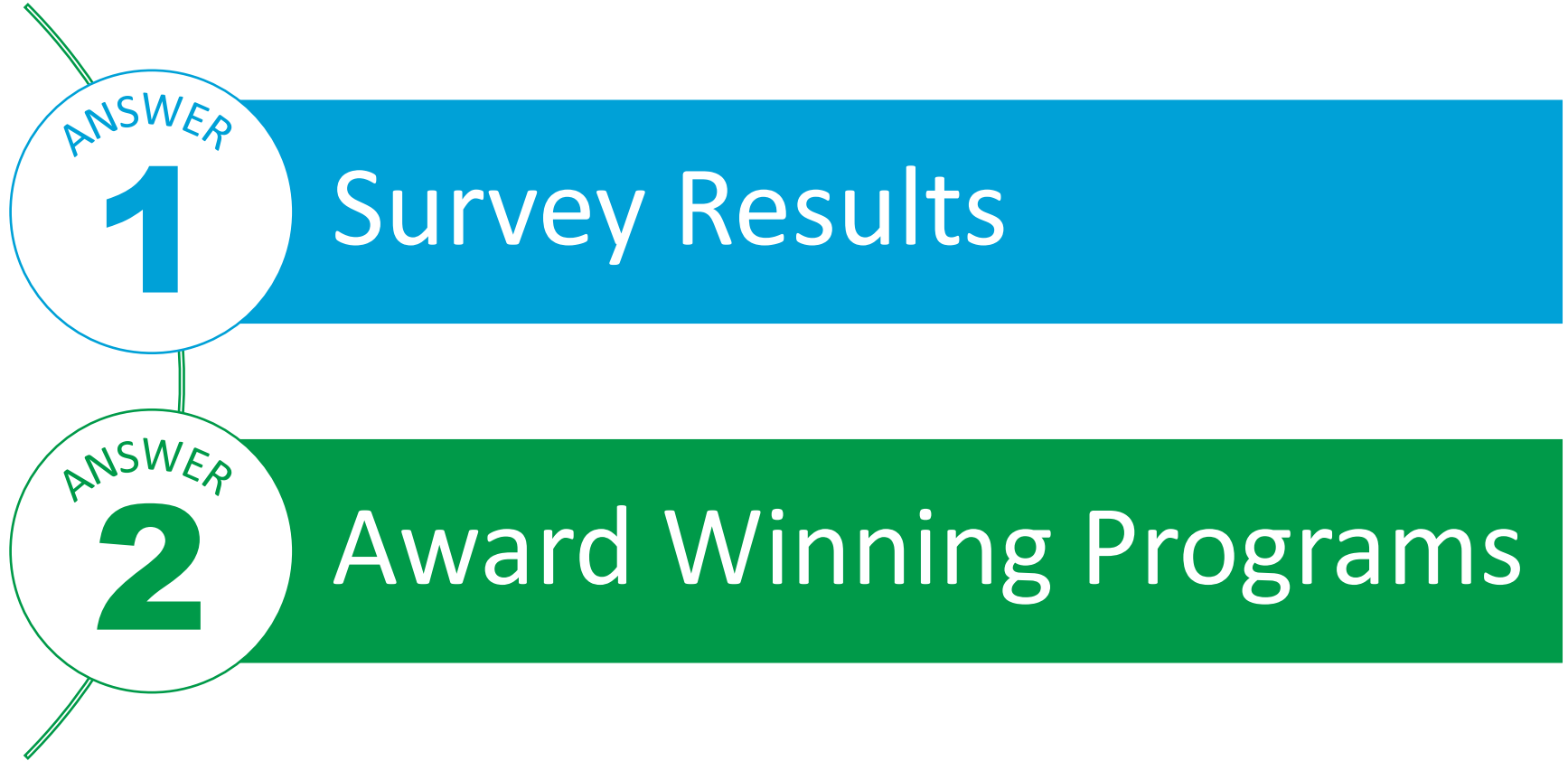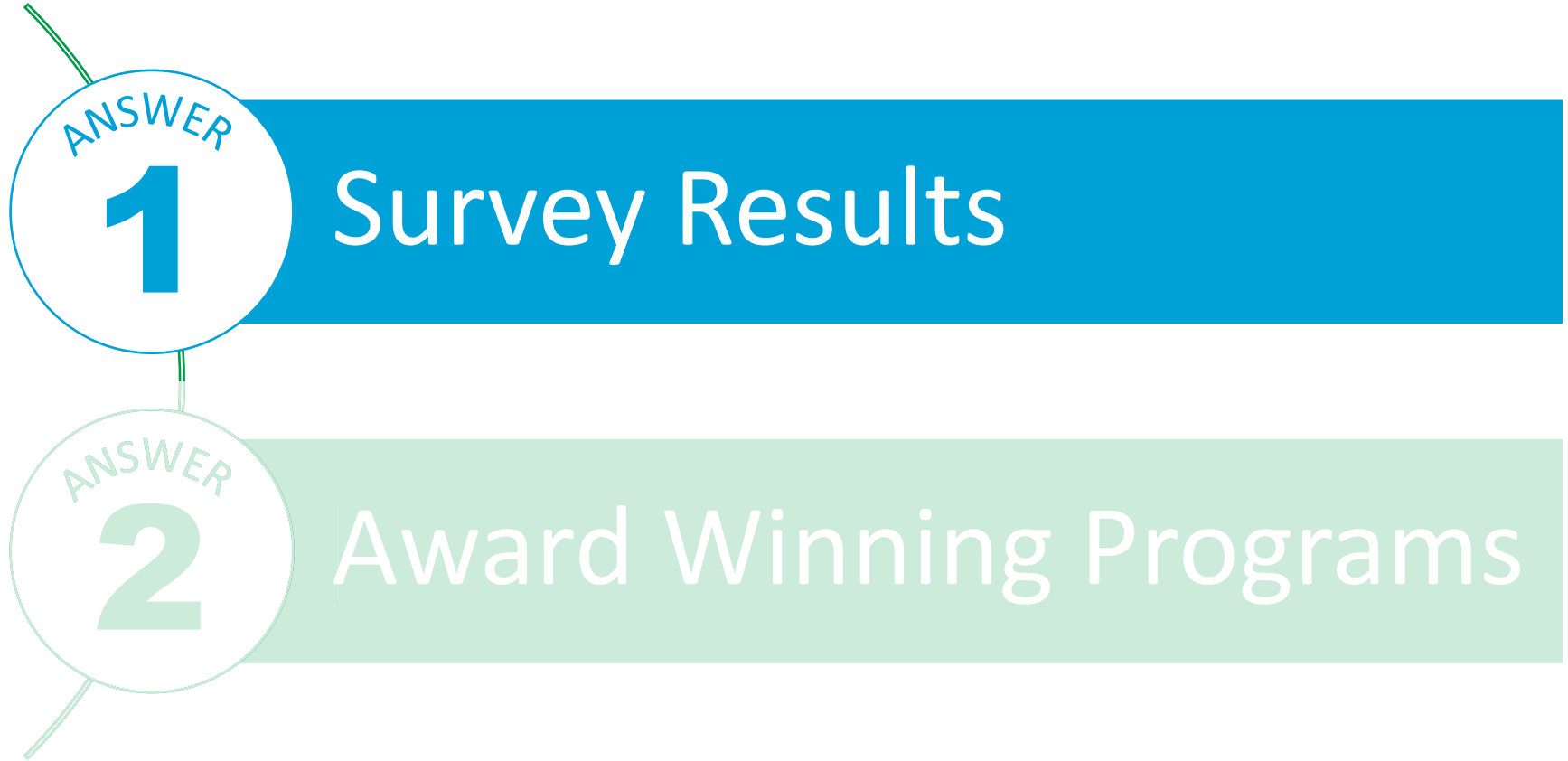
2014 ReliabilityWeb Survey Results…

Legacy Maintenance Initiatives

IMPLEMENTATION RELIABILITY CHANGES

30% Successful

70% Other

RCM

PdM

MRO

EAM/CMMS

RCA

OPX

TPM

Planning

2013 ReliabilityWeb Survey Results...

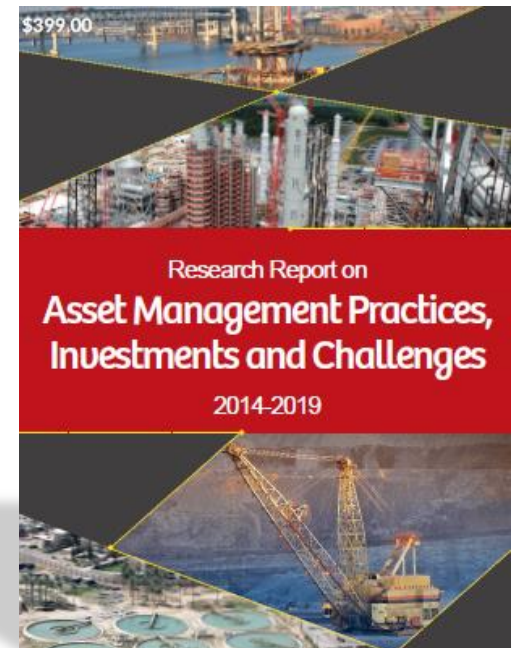# More Survey Results…

2014 ReliabilityWeb Survey High Level Results
(1,000 cross industry surveyed)

- **Organizational Culture change is biggest obstacle**

- Reliability Improvement is a significant goal

- 1/3 plan on Benchmarking/Gap Assessment in next 12 months

- CAPEX/OPEX integration

$399.00

Research Report on
Asset Management Practices, Investments and Challenges
2014-2019

Other Survey Results...

2013 McGraw-Hill Survey High Level Results
(450 water industry surveyed)

- Holistic Asset Management Programs see biggest benefits

- **Execution/Change Management requires focus**

- Condition Assessments #1 in Effectiveness

- 81% find Business Cases effective for CIP decision-making

SmartMarket Report

McGraw_Hill CONSTRUCTION
connecting people, projects, products

Water Infrastructure Asset Management:
Adopting Best Practices to Enable Better Investments

Premier Corporate Partner:
CH2MHILL.

Association Research Partners:
APWA • American Water Works Association • NACWA • NAWC • Water Environment Federation
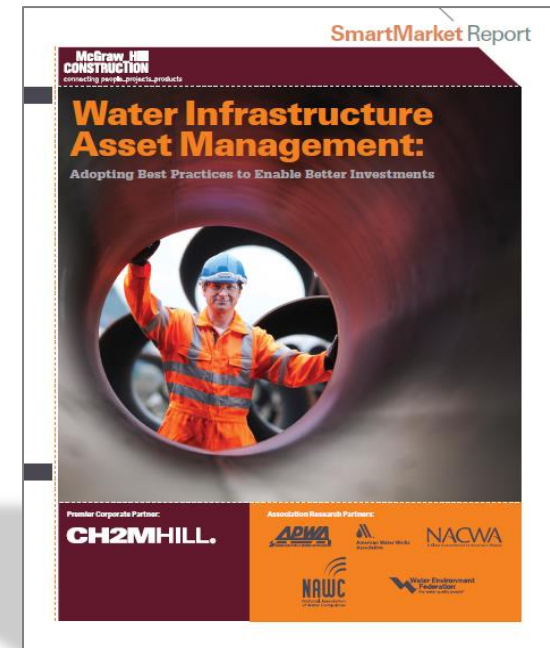
Other Documented Needs…

2015 Harvard Business Review

We know that it matters. A recent survey of more than 400 global CEOs found that **executional excellence was the number one challenge** facing corporate leaders in Asia, Europe, and the United States, heading a list of some 80 issues, including innovation, geopolitical instability, and top-line growth. We also know that execution is difficult. **Studies have found that two-thirds to three-quarters of large organizations struggle to implement their strategies.**
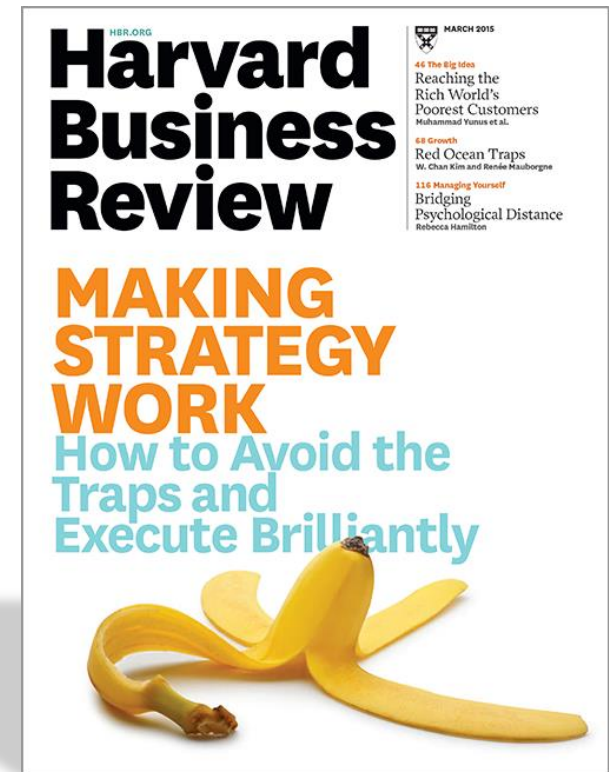
Survey Says…

We plan to develop Reliability / AM Strategic Plans

BUT, we need

Strategy Execution Best Practices

Survey Says…

Strategy Execution Best Practices can…

- Engage staff to drive sustainable change

- Capture benefits offered by best / leading practices

- Deliver ROI on new strategy investments

Why DELTA FORCE?

ANSWER 1 Survey Results

ANSWER 2 Award Winning Programs
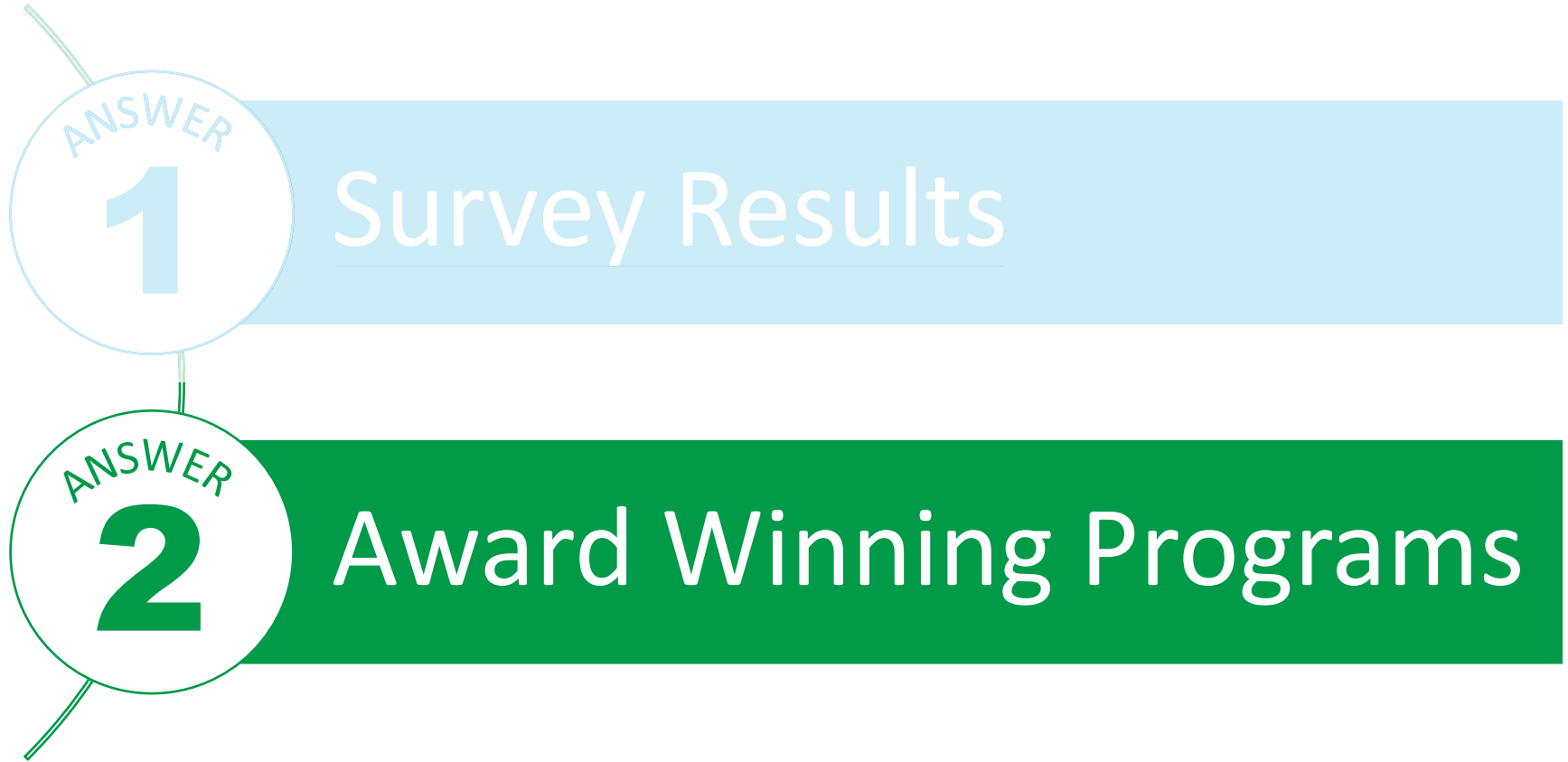
ReliabilityWeb CEO asked....

How Does a Public Sector Company
Win an UPTIME AWARD?

...not just 1

...BUT 2 AWARDS....

Cincinnati MSD Maintenance & Reliability Program Exceeds Goals

Maintenance and reliability initiatives were implemented and successes communicated to staff and community
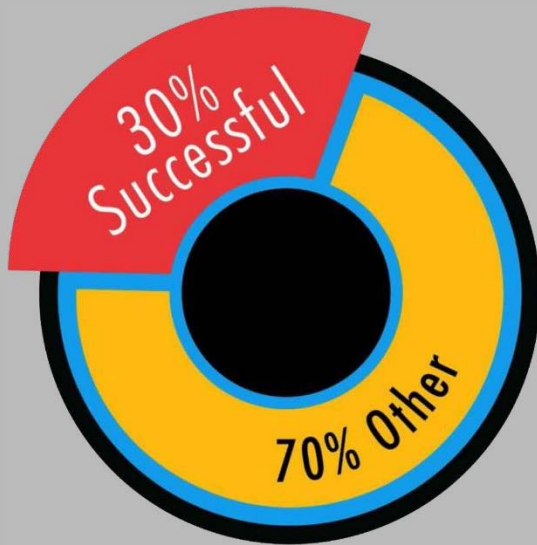
2-time Uptime Awards Winner

Highlights

- Conducted Maintenance and Reliability Gap Assessment
- Developed a Strategic Plan and Master Schedule
- Created "Guiding Light" (Vision / Mission / Values / Goals)
- Chartered Steering and Task Teams
- Increased training opportunities and active management listening, facilitated by increased communication planning
- Documented Benefits and Savings

Benefits

- Reduced reportable accidents by 36 percent
- Reduced reactive maintenance 30.6 percent; achieving 7:1 cost savings ratio on maintenance
- Reduced overtime usage by 17 percent
- Implemented 24,000 planned jobs in 2012, achieving 75 percent weekly scheduling performance
- Held more than 20 training workshops in 2012 covering reliability/RCM predictive maintenance and planning and scheduling

PAST

FUTURE

IMPLEMENTATION RELIABILITY CHANGES

IMPLEMENTATION SUCCESS RATE

30% Successful

70% Other

30% Other

70% Successful
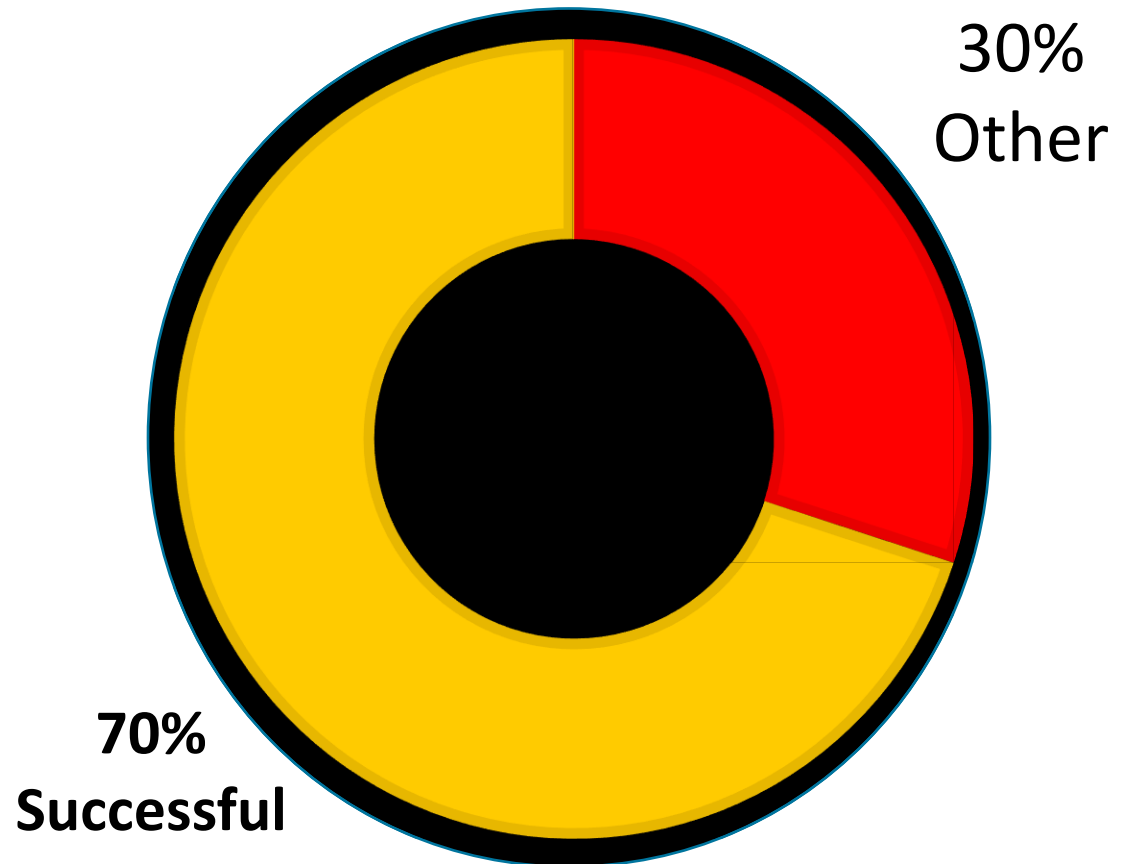
So ReliabilityWeb CEO and I teamed up, put 2 and 2 together and got....

THE 5-STEP MODEL

PLAN
(5-Step Model)

1. Define the Problem / Opportunity

2. Envision the Future

3. Lead by Example

4. Task Management

5. Active Monitoring
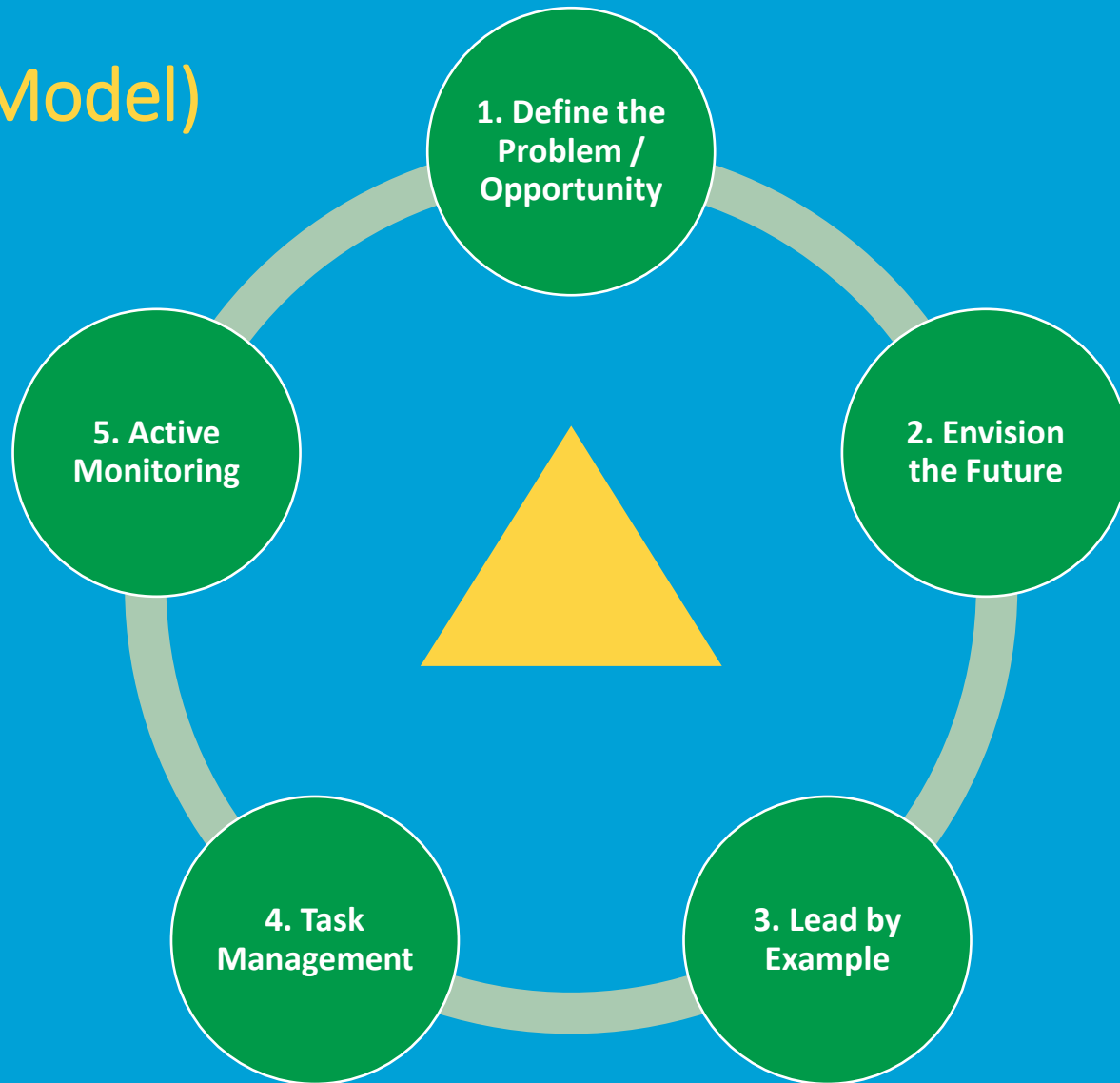
EXECUTE
(Critical Success Factors)

24
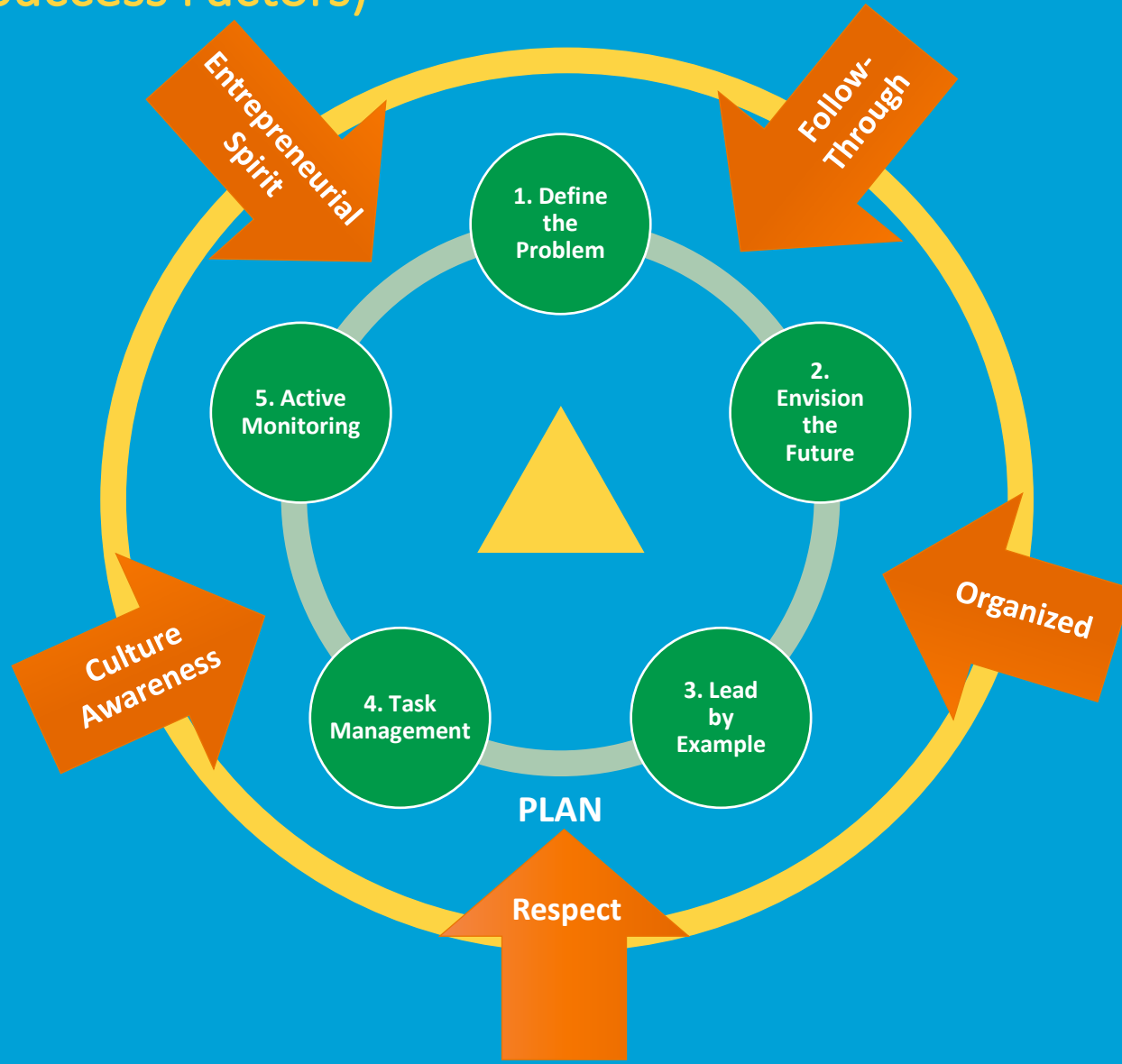
The FUTURE is with…
The **DELTA FORCE** model

- The DELTA FORCE™ model for strategic execution excellence is built on nearly 15 years of proven success helping companies and executives **accelerate and deliver real value** from Asset Performance and Reliability Management change initiatives/programs

- Book Release – The RELIABILITY Conference, April 2016

- Packaged Nicely in the Book - **Why Execution Fails And What to Do About It**

But isn't there a silver bullet?

by John Fortin

WHY EXECUTION FAILS AND

What To Do About It

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glasbergen.com

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glasbergen.com

Doctor of Strategy Execution
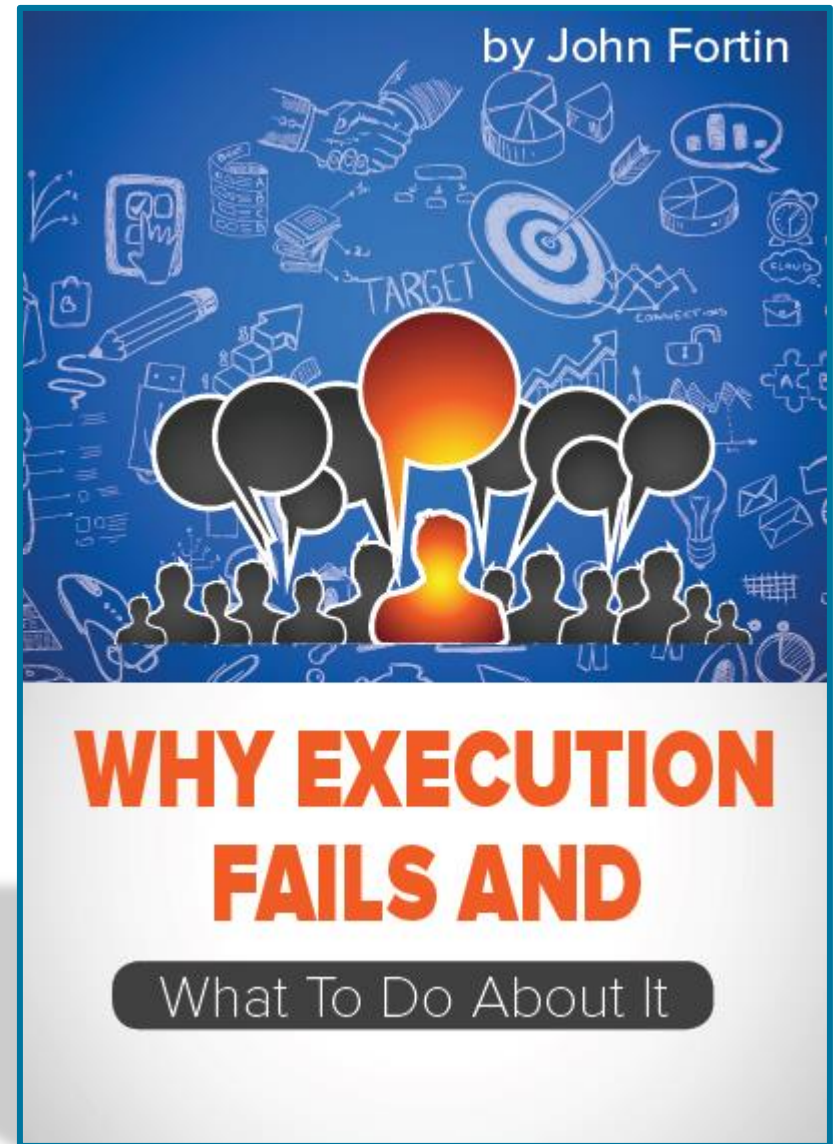
"Right now I take a blue pill, a purple pill, an orange pill, a white pill, and a yellow pill. I need you to prescribe a green pill to complete my collection."

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CH0620161143MKE

Agenda

WHAT

WHY

DELTA

FORCE

START

What is DELTA FORCE ?

Why DELTA FORCE ?

DELTA Overview

FORCE Overview
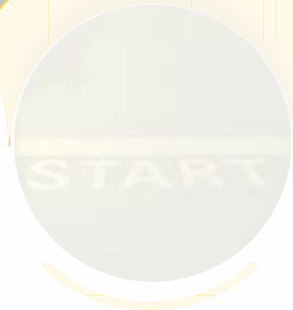
Getting Started

DELTA Strategic Execution Excellence Process

Active Monitoring

Task Management

Lead By Example

Envision the Future

Define the Problem

Monitor Progress	Benefits Tracking	Coaching and Mentoring	Communication Plan

Work Plan & Schedule	Task & Sub-Task Teams	New Process & Technology Training

Executive Sponsor | Values | Steering Committee

Vision | Drivers

Problem

31

Define and **E**nvision

Gap Analysis	Best Practices Assessment	Gap Analysis	Recommended Actions

Strategic Plan	Improvement Plan/Road Map	Goal Alignment and Expectations	Focused Action

Sample Mission, Vision, Values and Strategic Plan Summary

Mission Preserve process functions so we protect the health of the citizens and the quality of our environment

Vision Maximize plant throughput – treatment, at the most effective cost

Values Honesty, Accountability, Integrity and Respect

2012-2013

Strategic Maintenance & Reliability Plan

Goals and Objectives:

1. **Focus on Core Business** Prevent and correct failures. Reduce special projects.
2. **Training** Invest in maintenance and reliability program and specialized training.
3. **Communication** Increase involvement and awareness through leadership listening.
4. **Reliability** Generate proactive work through improved maintenance strategies and a living program to improve uptime.
5. **Maintainability** Reduce downtime through centralized and decentralized predictive maintenance program.
6. **Plan and Schedule** Planner/Scheduler are focused on future work and capturing work history.

Leadership via the Team-Based Organizational Structure

Improvement Initiative

Executive Sponsor

Steering Team
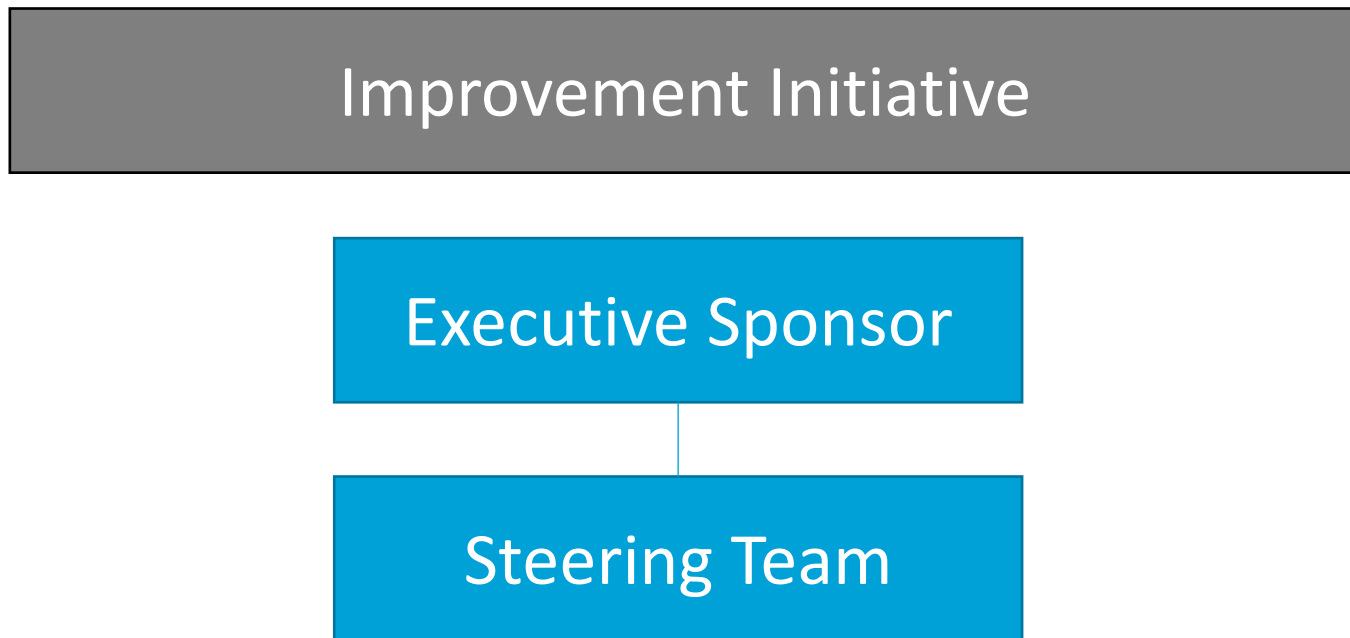
Leadership via the
Team-Based Organizational Structure

ASSET MANAGEMENT PROGRAM

Mission

Membe

Deliverables and Schedule

1. Develop and implement program sustainment structure
2. Develop schedule and forum for updates to executive staff
3. Determine what support and organizational resources should be funded to support the FAMP program

Key Activities

- Attend monthly FAMP Joint Steering Committee/Project Team meetings
- Ensure appropriate staffing resources are assigned to the FAMP initiative
- Review and comment on consultant reports and in-house staff recommendations
- Attend and participate in quarterly forum events
- Attend task team meetings, as applicable
- Monitor progress of Master Asset Protection Plan (MAPP) schedule
- Provide quarterly FAMP updates to executive staff
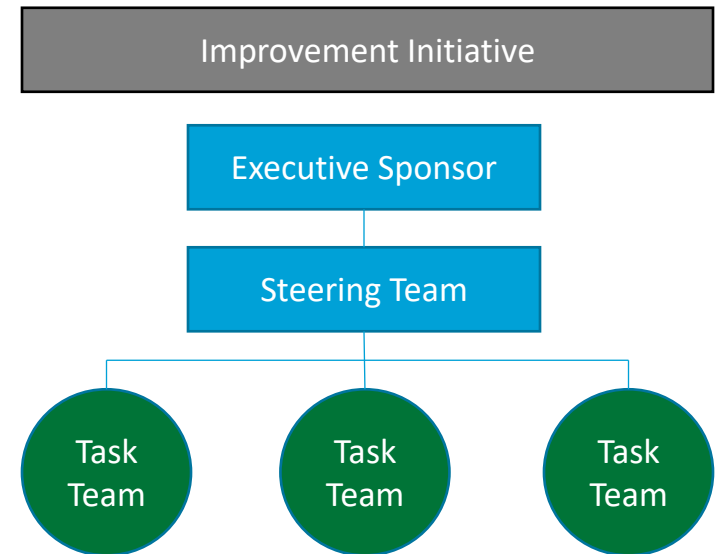
Expected Benefits

- Timely implementation of FAMP program elements
- Agency-wide involvement and program communications
- Supports the goal of FAMP – integration of maintenance, operations, engineering and financing to optimally maintain Company X's assets to meet all regulatory requirements

Executi

Charter Date:

Signatures:

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Task Management and Active Monitoring

Task Management and Active Monitoring

"Find of the Week" News

WWT MAINTENANCE UTILIZES A VARIETY OF PREDICTIVE TECHNOLOGIES, PREVENTIVE STRATEGIES AND ACTION TEAMS TO SUPPORT THE WWT MISSION OF PRESERVING PROCESS FUNCTIONS, TO KEEP PLANT PROCESS SYSTEMS ONLINE, IMPROVE EQUIPMENT RELIABILITY AND REDUCE DOWNTIME

Friday, May 16, 2014

Mill Creek Treatment Plant

Oil Analysis Determines Lubricant Condition, Extends Asset Life Cycles

Background Analysis:

Today's find comes from the WWT Maintenance Oil Sampling and Analysis Program. Oil testing results and follow-up work orders were coordinated by Maintenance Planner Rob Johnson and Mechanical Maintenance Crew Leader Bryan Royce. Equipment oil samples were collected and PDMR follow-up filtering was completed by Mill Creek Plant Maintenance Workers Mark Hassenger, Tom Kocol and John Harvey.

WWT Maintenance periodically collects samples and tests the oil from critical treatment process equipment. The oil samples are analyzed by a contracted laboratory to monitor the lubricant's condition, as well as the health of assets. Sampled oils are tested for proper viscosity levels, additive content, water contamination and the presence of wear particles. The sample report for the hydraulic oil in Schwing Solids Pump #1 at the Mill Creek Dewatering Process building revealed high particulate content in the oil. A high concentration of wear particles in oil causes abrasive wear and damage to internal hydraulic system components, leading to premature equipment wear-out and eventual failure.

Follow-up Actions:

A PDMR follow-up work order was generated to filter the hydraulic oil and replace the oil filters. Since the viscosity of the oil was still within required specifications, and there was no water contamination, the existing oil could be filtered in place to remove particle contaminates, instead of performing a complete oil change. Filtering the existing oil extends the time between oil changes, keeping equipment in service longer and saving the cost of over 200 gallons of new oil. Oil analysis lets the oil itself tell maintenance when it's time for an oil change, instead of simply changing oil on a time-based frequency regardless of the condition of the oil. The PMW's cycled the oil through a filtration unit to remove the excessive wear particles, and replaced the hydraulic oil filters. The total costs for oil sampling, labor and new filters for this proactive work were $638.68. The cost of 220 gallons of hydraulic oil required for a complete oil change in this equipment is approximately $1,920.00, resulting in a minimum cost avoidance of $1,281.32 for materials alone, with additional expenses incurred for labor and process equipment downtime.

TESTOIL
INDUSTRIAL ANALYSIS

Above left: Copy of the oil analysis report for the #1 Schwing Solids Pump, showing excessive particulate contamination in the hydraulic oil.
Above right: Picture of the portable oil filtration unit used by maintenance staff to filter existing oil in place, helping avoid unnecessary oil changes and reducing costs to purchase new oil.

Task Management and Active Monitoring

Table A-1: MWRA's Communications Plan

METHOD	FREQUENCY	AUDIENCE
RCM Briefings	As needed	DITP – All Staff
RCM II Hats	As needed	RCM Analysis Members
FAMP Project Meetings	Biweekly	FAMP Project Team Members
FAMP Steering Committee Meetings	Monthly	MWRA Senior Management
FAMP Task Team Meetings	As needed	Task Team Members
Board Staff Summaries	As needed	MWRA Board of Directors
RCM 3-Day Training	As needed	MWRA Staff
RCM 1-Day Training	As needed	MWRA Senior Management
Site Visits and FAMP Presentations	As needed	MWRA Staff
FAMP *This Week* Articles	Monthly	All MWRA Staff
All-Staff Status Memorandums	Quarterly	DITP – All Staff
RCM Pilot Project Status Board	Monthly	DITP Staff and Visitors
RCM *Welcome to Pilot* Board	Continuous	DITP Staff and Visitors
Maintenance Performance Report	Monthly	MWRA Senior Management
Reliability Process Model (Poster)	Continuous	DITP – All Staff
RCM Implementation Plan (Poster)	Continuous	DITP – All Staff
Staff Informational Update Meetings	Monthly	DITP Staff
FAMP Intranet Site	Continuous	All MWRA Staff

Agenda

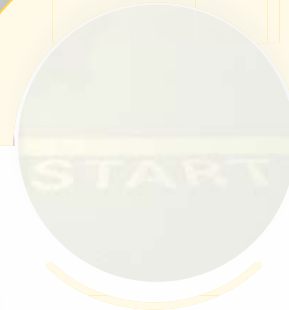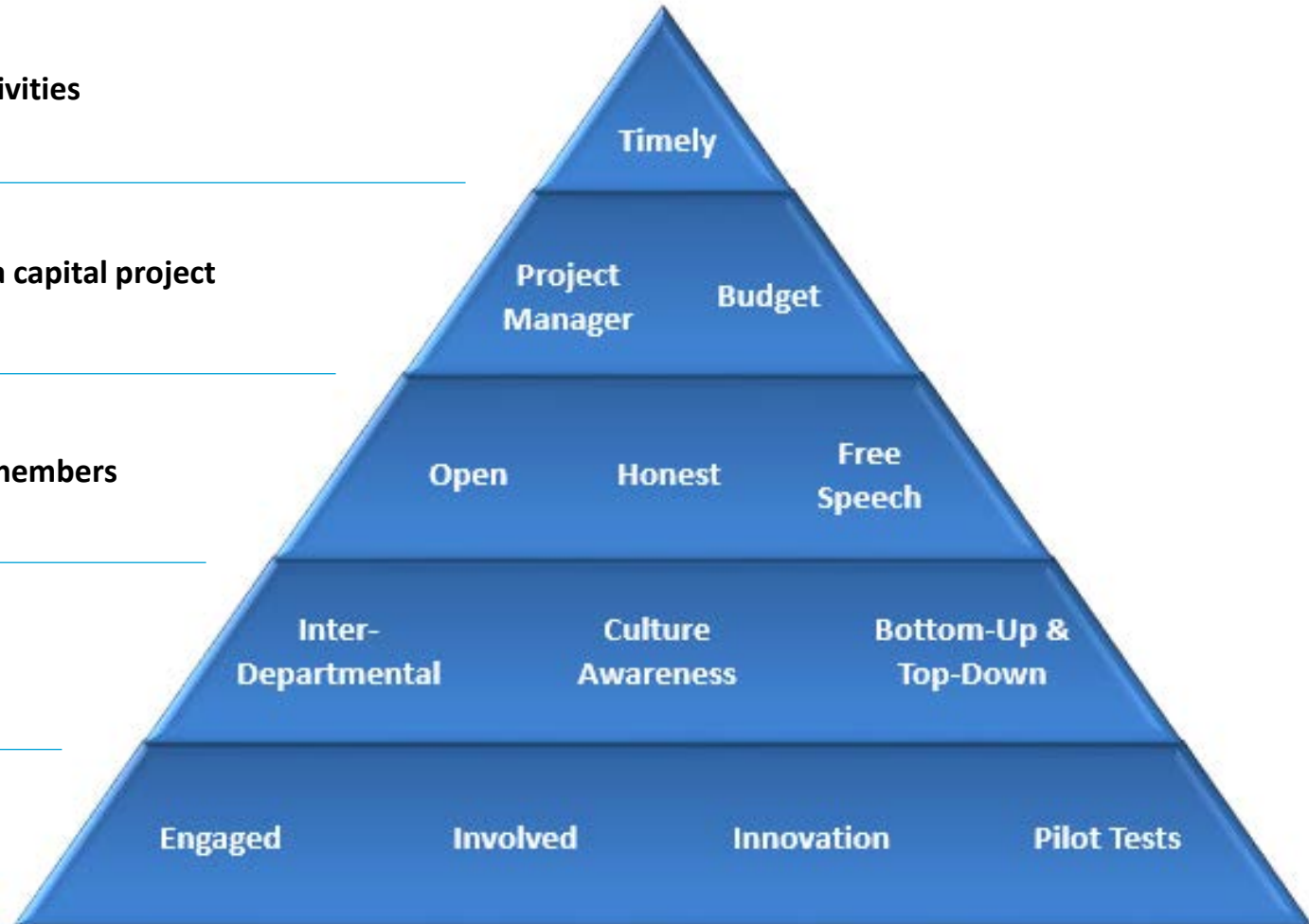| WHAT	WHY	DELTA	FORCE	START
What is DELTA FORCE ?	Why DELTA FORCE ?	DELTA Overview	**FORCE Overview**	Getting Started

FORCE Strategic Execution Excellence Imperatives

Follow–through on activities

Organized – treat like a capital project

Respect among team members

Culture Awareness

Entrepreneurial

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Follow-through and Organized

MEETING AGENDA

MEETING MINUTES

John Fortin to do **XX** by _date_

Treat Like A Capital Project
(*How Things Get Built*)

- Project Manager
- Scope
- Schedule – Multi-Year
- Budget
- Team

Respect, Culture, Entrepreneurial

- Yes, and…
- Team dynamics
- Positive energy
- Test ideas

Follow–through on activities

Organized – treat like a capital project

Respect among team members

Culture Awareness

Entrepreneurial

Timely

Project Manager | Budget

Open | Honest | Free Speech

Inter-Departmental | Culture Awareness | Bottom-Up & Top-Down

Engaged | Involved | Innovation | Pilot Tests
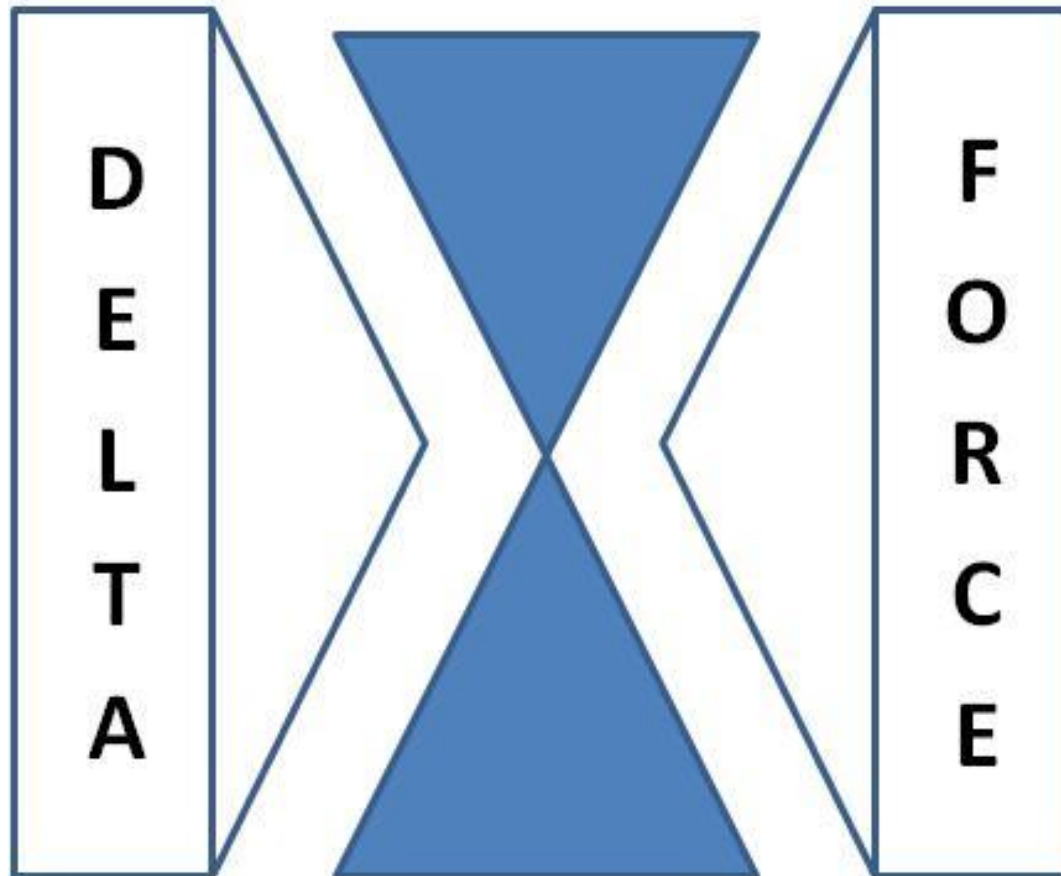
execution ™

excellence

Agenda
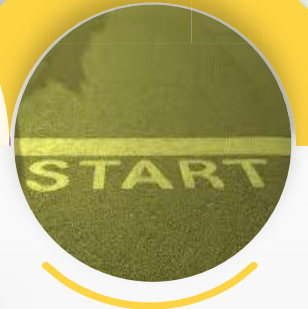
| WHAT	WHY	DELTA	FORCE	START
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Getting Started - Readiness

Readiness Category	Strategies
1. Leadership	• Identify Executive Sponsor • Establish a Steering Committee
2. Vision for Change	• Conduct a Gap Assessment • Create a Vision Statement
3. Change Strategies	• Define Roles / Responsibilities • Progress & Benefits Capture
4. Overcoming Resistance to Change	• Develop Communications Plan • Conduct Feedback / Town Hall Meetings
5. Managing Staff Performance	• Apply Team-Based Implementation Model • Create Skills Training / Development Plan

Getting Started - Readiness

Fishbone Diagram

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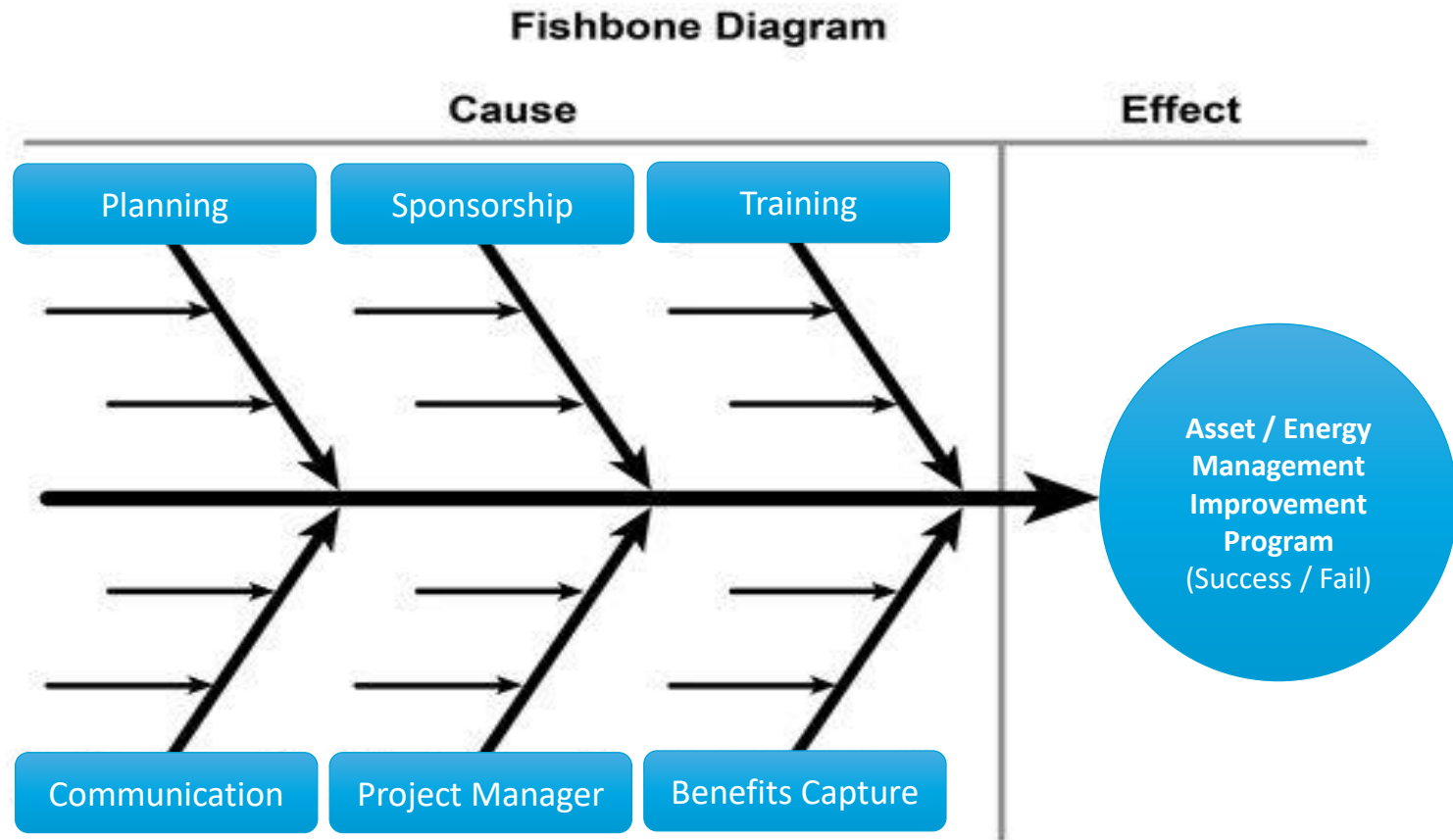
Getting Started - Readiness

Appendix E: Readiness Review / Survey

Strategy Execution Readiness Assessment						
	Topic	Disagree				Agree
		1	2	3	4	5
1.0 Leadership						
1.1	There is a common vision for strategic change					
1.2	Leaders are committed to strategic change					
1.3	There is a strong sense of urgency for strategic change					
1.4	Leaders understand trust and respect each other					
1.5	Leaders are modeling new values and behaviors					
	Subtotal	0	0	0	0	0
2.0 Vision for Change						
2.1	The rationale for this strategic change is clear and compelling					
2.2	I have a clear understanding of the road map to achieve the vision					
2.3	I understand what this strategic change means for me					
2.4	I understand that this strategic change is good for the company					
2.5	I understand what I need to do to achieve the vision					
	Subtotal	0	0	0	0	0
3.0 Change Strategies						
3.1	There is clear authority and accountability for this strategic change process					
3.2	There is a clear project structure for keeping strategic change on track					
3.3	Problems that emerge will be dealt with effectively in a timely manner					
3.4	There is an understanding of the issues involved and sufficient time has been allowed for the strategic change process					

Getting Started - Readiness
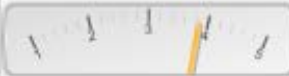
Cincinnati Readiness Survey Report

ch2m:

Facility	MSD		Tier	4
Location			Survey Date	4/26/2016
Comments	Leadership Summit MEI Readiness Survey on 4/25/16. 17 completed forms.			

Topic		Disagree				Agree	
		1	2	3	4	5	
Leadership		0	1	38	23	21	
1.1	There is a common vision for strategic change	0	0	9	4	4	
1.2	Leaders are committed to strategic change	0	0	8	4	5	
1.3	There is a strong sense of urgency for strategic change	0	1	7	4	5	
1.4	Leaders understand trust and respect each other	0	0	6	6	5	
1.5	Leaders are modeling new values and behaviors	0	0	8	5	2	
Vision for Change		0	4	19	44	15	
2.1	The rationale for this strategic change is clear and compelling	0	0	2	9	5	
2.2	I have a clear understanding of the road map to achieve the vision	0	3	7	8	0	
2.3	I understand what this strategic change means for me	0	0	3	10	3	
2.4	I understand that this strategic change is good for the company	0	0	0	9	7	
2.5	I understand what I need to do to achieve the vision	0	1	7	8	0	
Change Strategies		0	21	46	13	4	
3.1	There is clear authority and accountability for this strategic change process	0	5	8	4	0	
3.2	There is a clear project structure for keeping strategic change on track	0	7	8	2	1	
3.3	Problems that emerge will be dealt with effectively in a timely manner	0	3	8	3	2	
3.4	There is an understanding of the issues involved and sufficient time has been allowed for the strategic change process	0	5	10	1	0	
3.5	Related projects and initiatives will be well coordinated with this strategic change initiative	0	1	12	3	1	

Teaming up with ReliabilityWeb for success...
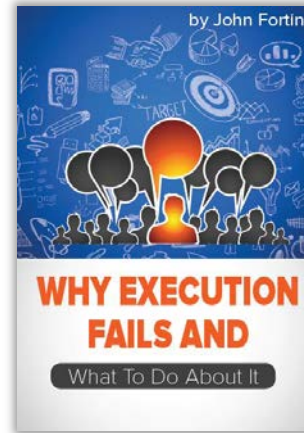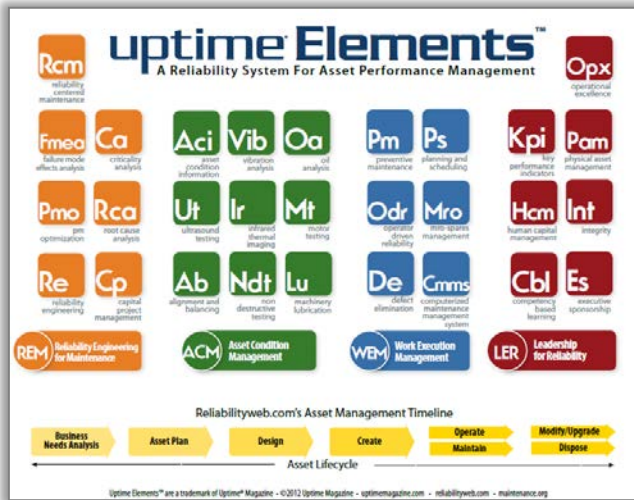
- Strategy Execution Excellence

- Initiative Implementation Success

- Change Management

- Return on Investment (ROI)

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Thank You!

> I think this is the "**silver bullet methodology**" and it really could work at my organization…

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