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Elecosoft helps NG Bailey use Powerproject to set new planning standards

NG Bailey

Summary

In recent years, UK independent engineering, construction and services company NG Bailey has been on the path to standardise and assure planning quality across its Engineering and Rail divisions. As a family-owned firm with a proud heritage to maintain, excellence is important across all its divisions, which also includes IT, Offsite Manufacture and Facilities Services. It uses Powerproject as one of its standard planning tools in Engineering, so turned to Elecosoft when it needed guidance on how the product could be used to set and maintain planning quality standards.

Planning Manager Kevin Bingham has been seconded out of his normal planning role for the past year to work with peers across NG Bailey on a business change programme, part of which is designed to help its entire planning community.

Kevin explained: "I'm leading the planning work-stream as part of a wider business change programme. Together with my peers in Engineering and Rail we are pulling together a Planning Policy and Standards Manual which will include planning guidance on all our refreshed business management processes and useful resources such as template programmes, progress reports and standard work breakdown structures, which can help to integrate other functions such as design, procurement, off-site manufacturing, quality control and commissioning." The programme, completed in February 2017, has already launched NG Bailey's NVQ level 3 planning apprenticeship and training scheme, to instil good practices even more widely across the business.
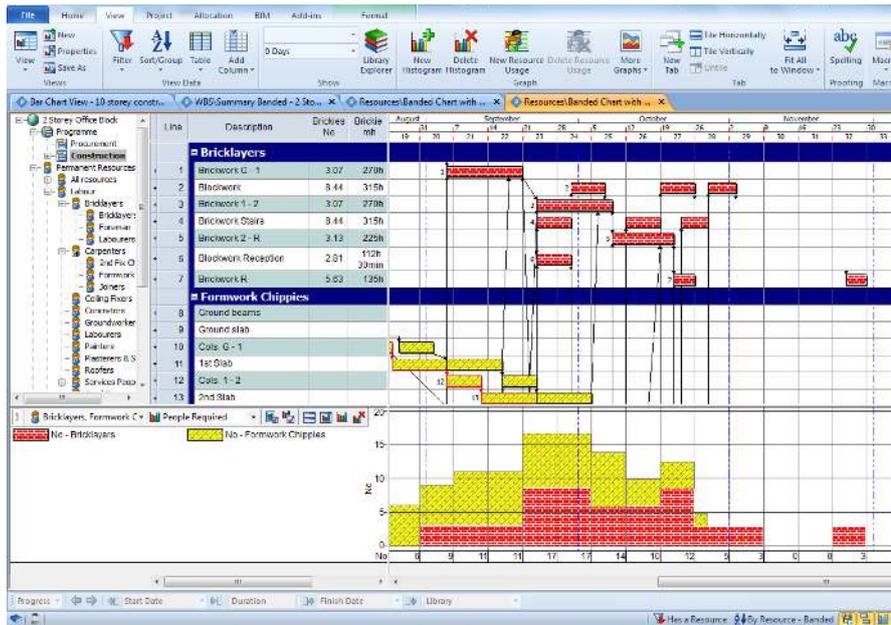
As a highly experienced Powerproject user, Kevin Bingham felt that he was more than able to create even complex programmes – but had never created a template programme before. He turned to Elecosoft for guidance.

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He said: "We had already run a couple of recent training sessions around Earned Value Management and the 4D BIM capabilities in Powerproject, but now I needed more specific support. I spoke to them about how we could create a standard NG Bailey Powerproject template. I was looking to understand the common do's and don'ts – because I wanted to get this right first time."

Elecosoft's consultancy team were able to help. An initial conversation on the phone provided lots of advice on things to look out for, but it was decided that a day's consulting time would be well worth taking. An Elecosoft consultant met with Kevin in July 2016 and he described the process: "At a half-day face-to-face session, Elecosoft's consultant brought along a useful guidance document on how to build templates and outlined the process to go through. Elecosoft provided plenty of instructions and clear screenshots – and were able to listen to what we needed."

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After that it was down to me, and a second half-day session could review and refine the template."

Keeping it Simple was the Key

Kevin outlined the positive experience that he had at his consulting session: "We worked through it all quite quickly – because the consultant came so well prepared. It wasn't a case of 'read that' and 'do that' – instead she listened to what we wanted to do, and spoke common sense. The value of Elecosoft's consulting was around all the intangibles – because they were speaking from actual experience. They'd seen all the common pitfalls. Most importantly, when I wanted to make extensive use of task pools and define all the sequences we use in the business to create standard design, procurement, construction and commissioning processes, the consultant made me pause. She pointed out that we were potentially making the template too complicated and prescriptive."

He continued: "She suggested that you have to start with a basis of setting a minimum standard for planners to build on, and I thought that was great advice. It was more a case of setting your calendars and resources, and keeping task pools simple with a few generic activities to give them the right start, the right structure and to provide inspiration – not necessarily trying

produce a logic-linked, end-to-end, prescriptive sequence. Otherwise, you're just inviting people to alter, edit and delete, which is contrary to what we're trying to do."

The advice proved valuable not only for the process of creating a standard Powerproject template, but to support the wider aims of the planning standards programme: "What I learned, and the big message that I circled in my notes, was: think about the user and the process they need to go through first. Ask yourself: am I making this template simple to use? I've since taken that principle through to other standard company documents that we have produced."

"Because Elecosoft's consultancy team have been there and done this process of standardisation with many other clients, they know all the pitfalls to look out for, and can advise and guide me. The process really delivered very, very

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useful advice", said Kevin.

Preparing for a Successful Rollout

"We're now planning the rollout. I will go to each region and, together with the planning manager for that area, we will be delivering an overview of our new Planning Policy and Standards Manual and doing a live run-through of the new Powerproject template. There will also be some short video tutorial clips. We'll begin using the Powerproject template on new projects we embark on in Engineering going forwards and, though it will take a bit of governance to ensure people are using it and getting the most out of it, I expect to start getting feedback about any tweaks that might be needed – and can start thinking about version 2!"

As his final words, Kevin reflected: "There's definitely value in a relationship like this – especially when you make the decision to standardise processes and upskill practitioners."

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