

Creating One “Source of Truth” to Ensure Cross-Functional Project Execution



put on production these Appraisal wells at the right costs and the right timeline. With little structure in place other than some high level goals and objectives, the project lacked an effective plan and many other critical management processes.

Improvement Goal/Objective:

The team was made up of various key functions each with their own plan in various different formats each operating in their own silo. Without one single source of truth, the team was forced to generate static schedules that were focused on showing status at static points in time, underlined by varying levels of assumptions built into the plan. The opportunity was to build an integrated plan that would measure project health, ensure consistent activity prioritization and execution across all the functions, provide that **single source of truth** on project status and help the organization test, and improve, the underlying assumptions behind the plan. This would be critical to getting each of the functions out of their silos to collaborate and focus on the same goal.

A rapidly growing business unit of an oil and gas major was about to move their Western Canadian tight gas holdings into the important Appraisal phase which would determine whether or not the asset was economically viable to invest in for the long term. This was a new asset, a new team and a new leader with the challenge of proving they could plan, drill, complete and

Solution:

A cross-functional “Integrated Planning” team was set up to design the system. As the team came together, they realized the biggest challenge to overcome would be the resistance to functional integration. These functions historically had worked in silos, and would require some level of compromise and standardization that was not immediately accepted. Through effective coaching and dialogue, the function leads realized that the benefit of having the Integrated Planning system outweighed the potential negatives of losing some individual freedoms. The design team then worked to build the structure of the plan. They designed a system that mirrored the way the organization was set up allowing for clear ownership and accountability.

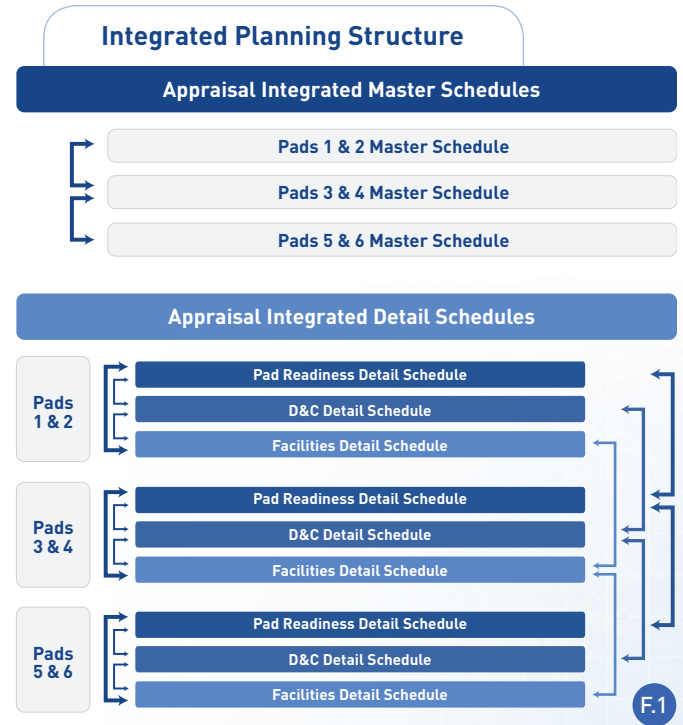
The plan was then divided into one master schedule governing three separate functional schedules, which were:

- Pad Readiness
- Drilling & Completions
- Facilities



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The Pad Readiness schedule **F.1** focused on early-phase work including, but not limited to, subsurface deliverables, the land access process, early phase cost estimates from Drilling and Completions and Facilities, Midstream options and civil earthworks activities. The Facilities and Drilling & Completions schedules would focus on the detailed engineering work within their respective functions and the execution of that work. These new Primavera schedules were aligned to the management system elements where overall integrated progress could be managed and controlled on a consistent basis. The team then installed weekly and monthly meetings where the teams could address tactical issues on a weekly basis and the “big picture” issues monthly. The integrated schedule allowed these meetings to focus on one data source keeping the teams aligned on critical milestones and changes to the plan. The team was then able to take actions to mitigate issues as “one team”.



CASE STUDY

Evolve Partners

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Approach

Improved visibility into potential critical path or high risk activities allows the team to work on issues before they become problems

Cross functional plan allows for meaningful collaboration and dialogue across groups and facilitates a “One Team” behavior

All deliverables across all functions defined, mapped and linked to one another through logic flow diagrams which drives accountability and ownership of objectives

Ease of use in the planning system enables the project team members to be creative in taking advantage of potential opportunities while also minimizing the effect of negative external factors on the schedule

Accuracy of the information in the schedule enables the management team to run planning scenarios efficiently and make fact based decisions on cost and schedule impacts of various issues

RESULTS

Improved Visibility

Cross Functional Plan
a “One Team” behavior

Logic Flow Diagrams drives accountability and ownership of objectives

Easy Planning Systems

Accurate Information

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