

DPRCG 2024 CONVOCATION

Tackling Non-Technical Risk Drivers Through a Refreshed Project Management Program

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DIALOG

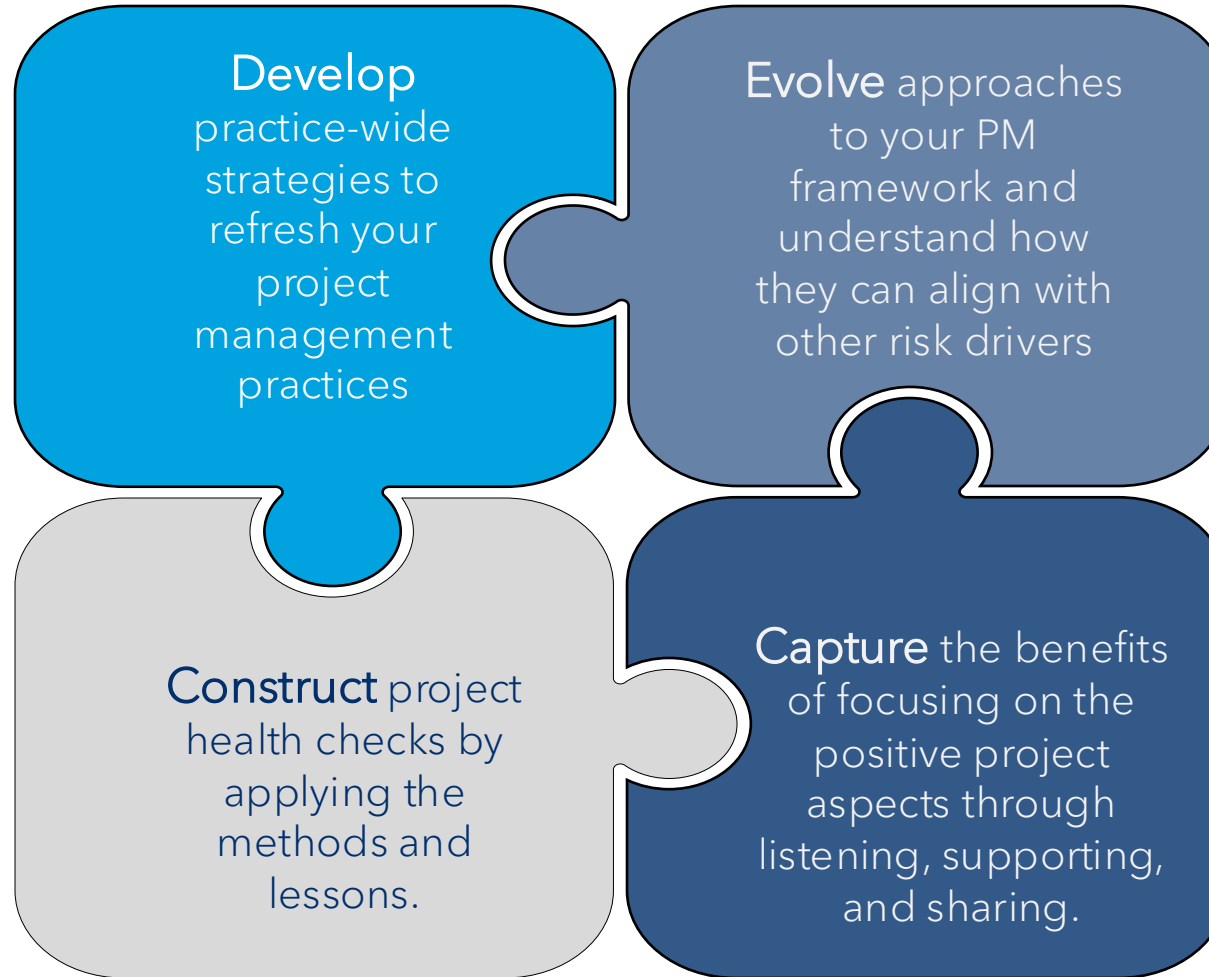


THE VALUE OF
TRUST

Agenda

- About me and DIALOG
- History and non-technical risk drivers
- Refreshed PM program
 1. PM learning series
 2. PM toolbox
 3. Project health checks
 4. PM community
- Key messages

Learning outcomes



Jessica Popadynetz



- Leader of Project Management & Process
- Resides in Edmonton, AB, Canada
- BSc, BEH, MSc, PMP
- Background in Public Health (Risk Assessment)

About **DIALOG**[®]



WE ARE PASSIONATE ABOUT DESIGN
WE BELIEVE IT CAN AND SHOULD
MEANINGFULLY IMPROVE
THE WELLBEING OF OUR COMMUNITIES
AND THE ENVIRONMENT WE ALL SHARE

DIALOG[®]'s values

COLLABORATION

- Create together
- Invite others into projects
- Share
- Be open, approachable and supportive
- Help others succeed

DIVERSITY

- Be respectful and empathetic
- Value and listen to input from others
- Approach our work in an integrated way
- Embrace diversity

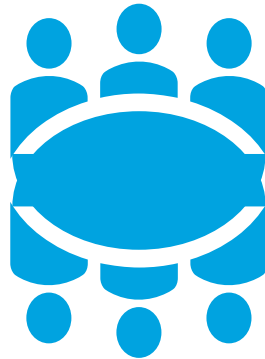
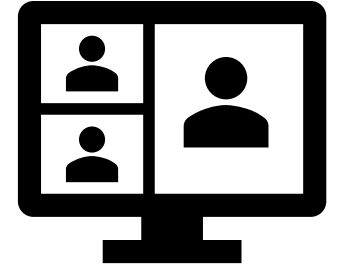
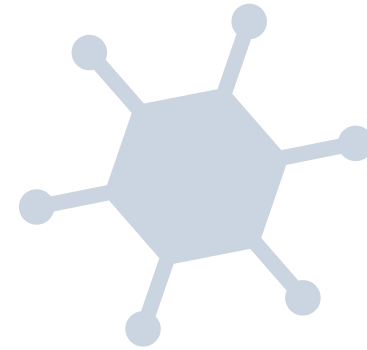
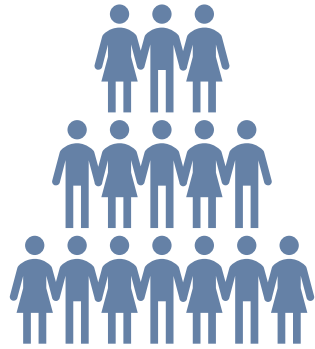
ASPIRATION

- Challenge the status quo
- Strive for constant improvement
- Be continuously curious
- Create success

OPTIMISM

- Be optimistic – focus energy on 'how to' rather than 'why not'
- Appreciate opportunities
- Have fun and laugh a little
- Enjoy the journey

How we got here



Leveraging AXA XL's larger perspective



Refreshing our PM Program

Foundational Course Learning Objectives

- PM101: Introduction to Project Management**
 - Understand what good project management is
 - Understand the roles and responsibilities of project managers
 - Familiarity with the "triple constraint model"
- PM102: Communication**
 - Understand the importance of good communication
 - Familiarity with the tools and technologies required for effective communication
 - Understand the quality and quantity of communication
- PM 103: Project Planning**
 - Understand the steps to strategically plan a project
 - Familiarity with the tools and technologies required for project planning
- PM 104: Project Monitoring and Control**
 - Construct the steps to intentionally monitor a project
 - Understand how Earned Value Analysis (EVA) is used to monitor budget and schedule
- PM 105: Earned Value Analysis (EVA)**
 - Apply the principles of Earned Value Analysis to determine if a project is on budget and schedule

1

Toolbox Overview

Agreements, Contracts & Tools

Project Planning

Project Communication & Organization

Project Monitoring & Control

Project Financials

Project Coordination

Feedback and Views

Toolbox Overview

Project Management


The Project Management & Tools enable access to a wide variety of tools and resources. Each section in the PM Tool Box provides a detailed overview of the tool. Every page in the PM Tool Box includes:

- Tools & Templates** Tool List
- Examples** Full PDF
- Resources** How and Where

Any questions about the PM Tool Box, please contact the Project Management & Tools team.

2

Project Health Check Guidelines



3



4

Tough on the issue, easy on the people



1. PM learning series

PM101: Introduction to Project Management

- Understand what good project management looks like at DIALOG
- Understand the roles and responsibilities of the Project Team throughout the project lifecycle
- Familiarity with the “triple constraint model” and DIALOG’s Quality Management Program

PM102: Communication

- Understand the importance of good communication for project success
- Familiarity with the tools and technologies required to support project management communications
- Understand the quality and quantity of communications required to effectively manage projects

PM 103: Project Planning

- Understand the steps to strategically plan and deliver the critical components of a project
- Familiarity with the tools and technologies required to support project management processes

PM 104: Project Monitoring and Control

- Construct the steps to intentionally monitor and control the project
- Understand how Earned Value Analysis (EVA) can help to determine whether your project is on budget and schedule.

PM 105: Earned Value Analysis (EVA)

- Apply the principles of Earned Value Analysis (EVA) to your project to determine whether your project is on budget and schedule

Challenges

Delivery & Content

- More interaction, too scripted
- Incorporate DIALOG examples and stories
- More of the “how”

Participation

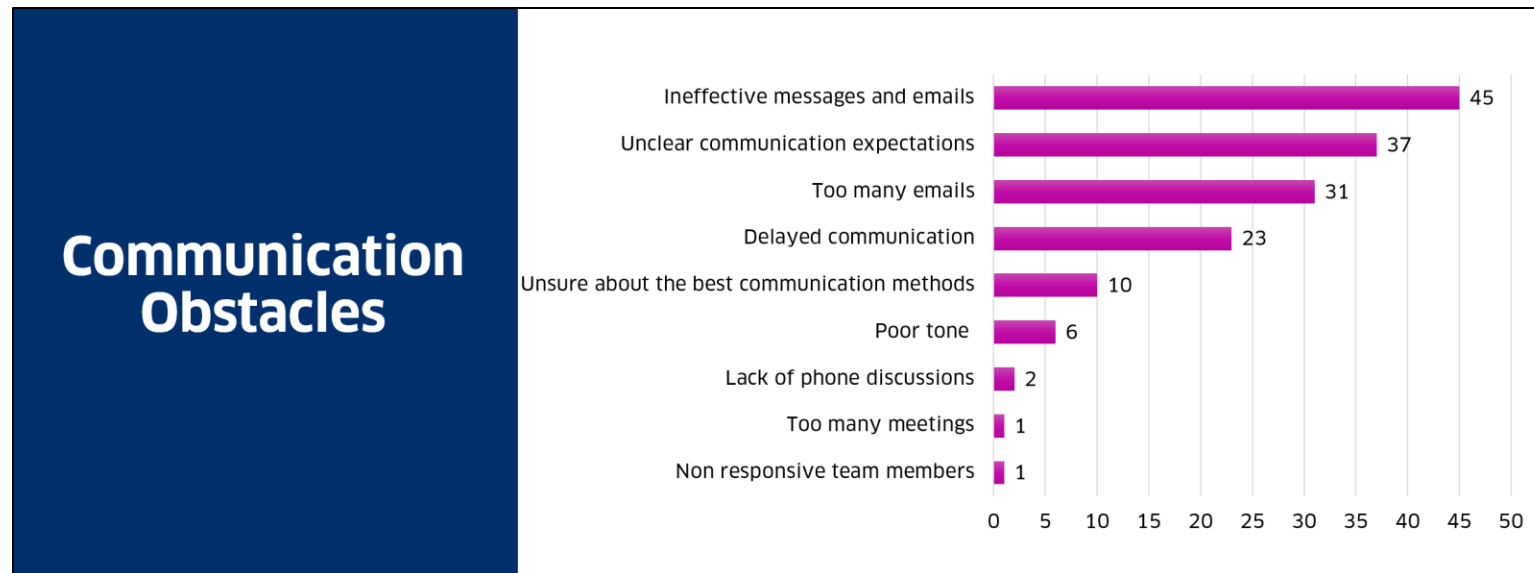
- Total invitees: 168
- 38% attended all 5 sessions; 19% did not attend
- 16 Partners attended at least 1 session



Late responses to [Requests for Information](#) led to a \$300,000 claim

Successes

- Appropriate, important, and clear content
- Reinforce / introduce PM tools
- Engagement through polls
- Information to inform future sessions



What's next

- Finding the right delivery cadence
- Improving content – listening to feedback & adapting to our needs
- Expanding content:



- Continuous evaluation
- Leadership buy-in


2. PM Toolbox

- Toolbox Overview
- Agreements, Contracts & Fees
- Project Planning
- Project Communication & Organization
- Project Monitoring & Control
- Project Financials
- Project Coordination
- Feedback and Ideas

Overview

- Project Delivery Checklist
- Glossary
- PM Skills - Self Assessment




Toolbox Overview



Project Management Toolbox Introduction

The Project Management Roundtable (PMRT) developed the Project Management Toolbox to enable access to a wide variety of PM tools to help us deliver projects at DIALOG.

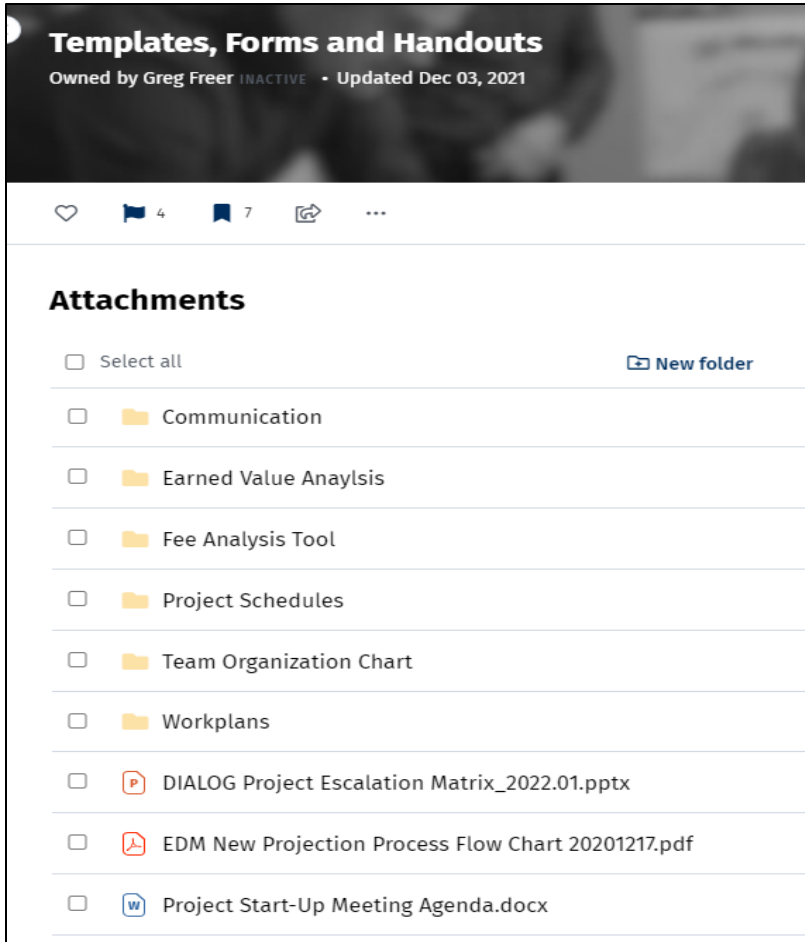
Each section in the PM Toolbox has a description of the PM tool, along with how and when to use the tool. Every page indicates what is included using the icons below:

-  **Tools & Templates** Templates include a variety of worksheets, forms, & checklists that help plan, monitor, control, and close our projects.
-  **Examples** Examples demonstrate good PM practice from DIALOG projects and are usually presented together with the tool or template.
-  **Resources** Resources are companion documents, like presentations, information sheets, and websites (including DASH) that relate to various areas of PM practice.

Any questions about the PM Toolbox can be directed to your [local studio member of the Project Management Roundtable](#). The PMRT welcomes questions and suggestions for improvement, and we will continue to update the Toolbox with the best templates, examples, and resources.

Version 1.0 *The Project Manager's Toolbox*

Where we started



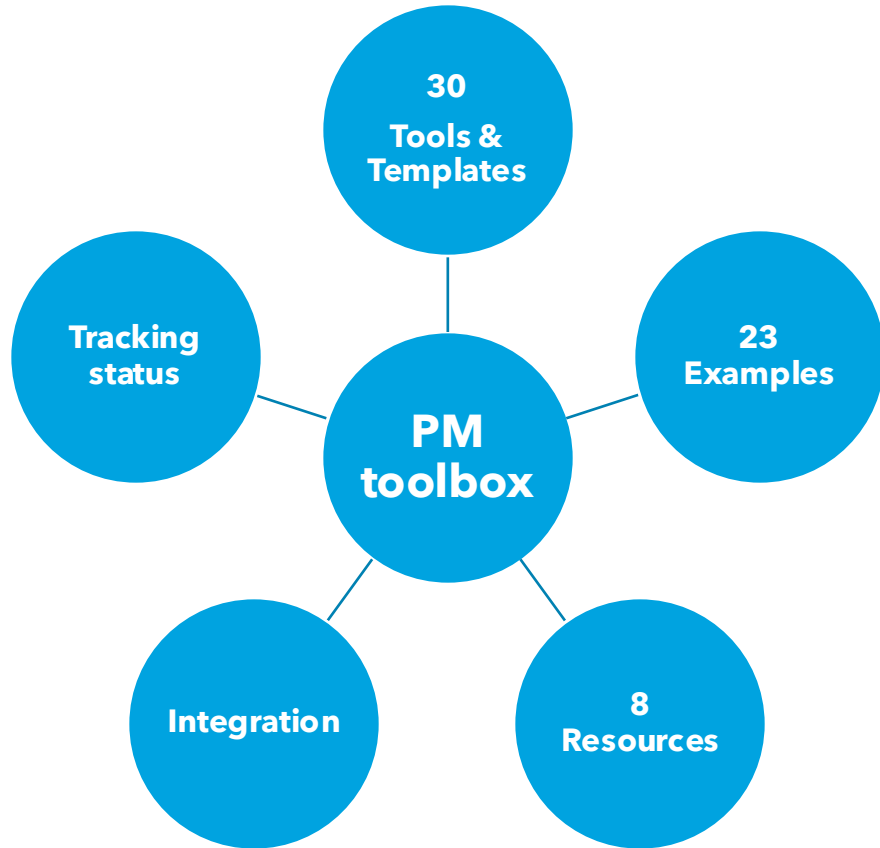
12 PM tools:

- Work plan templates
- EVA templates
- Kickoff agenda
- Escalation matrix
- Org chart

6 PM resources:

- PM checklist
- Communication and schedule FAQs

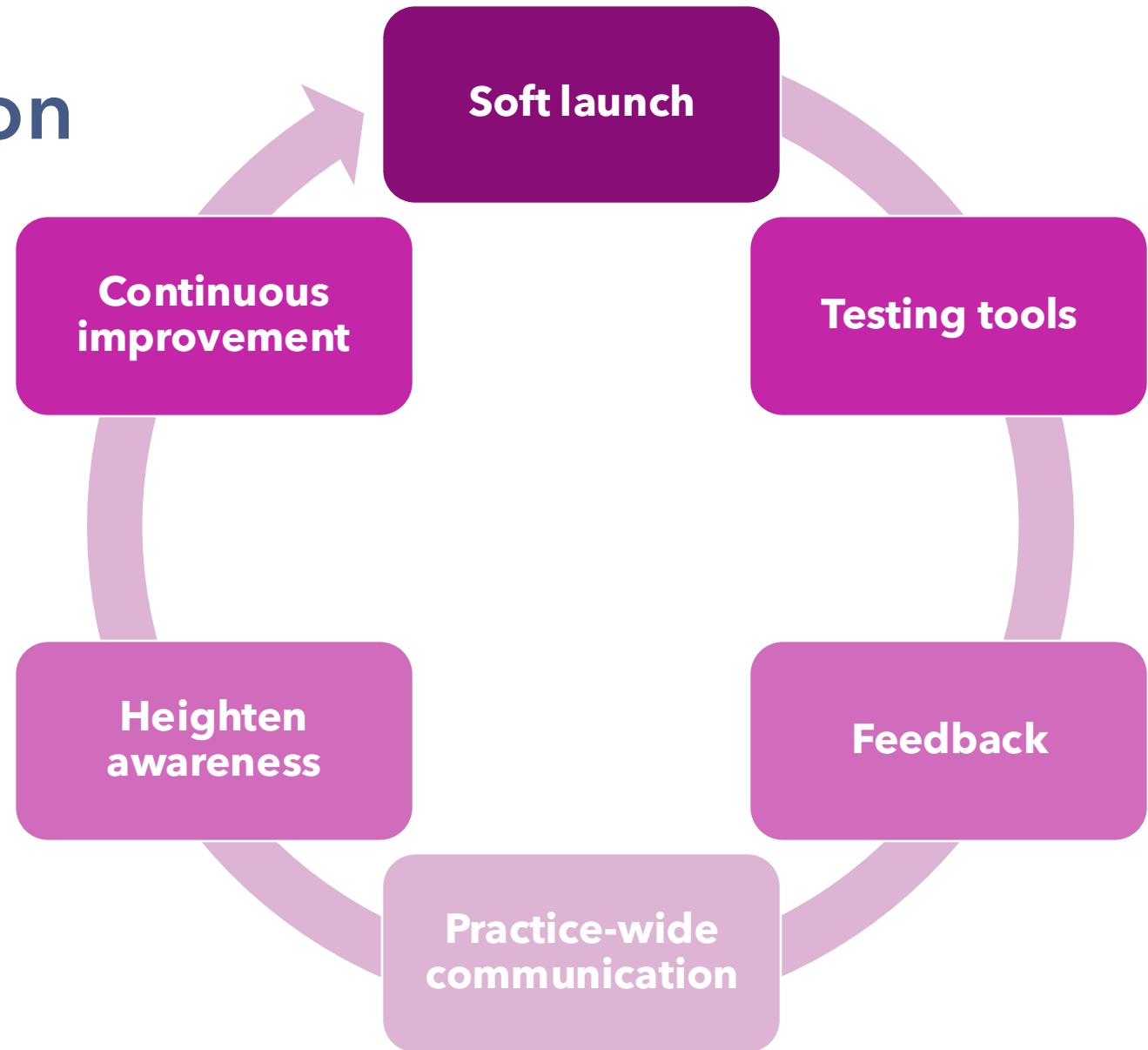
Where we are



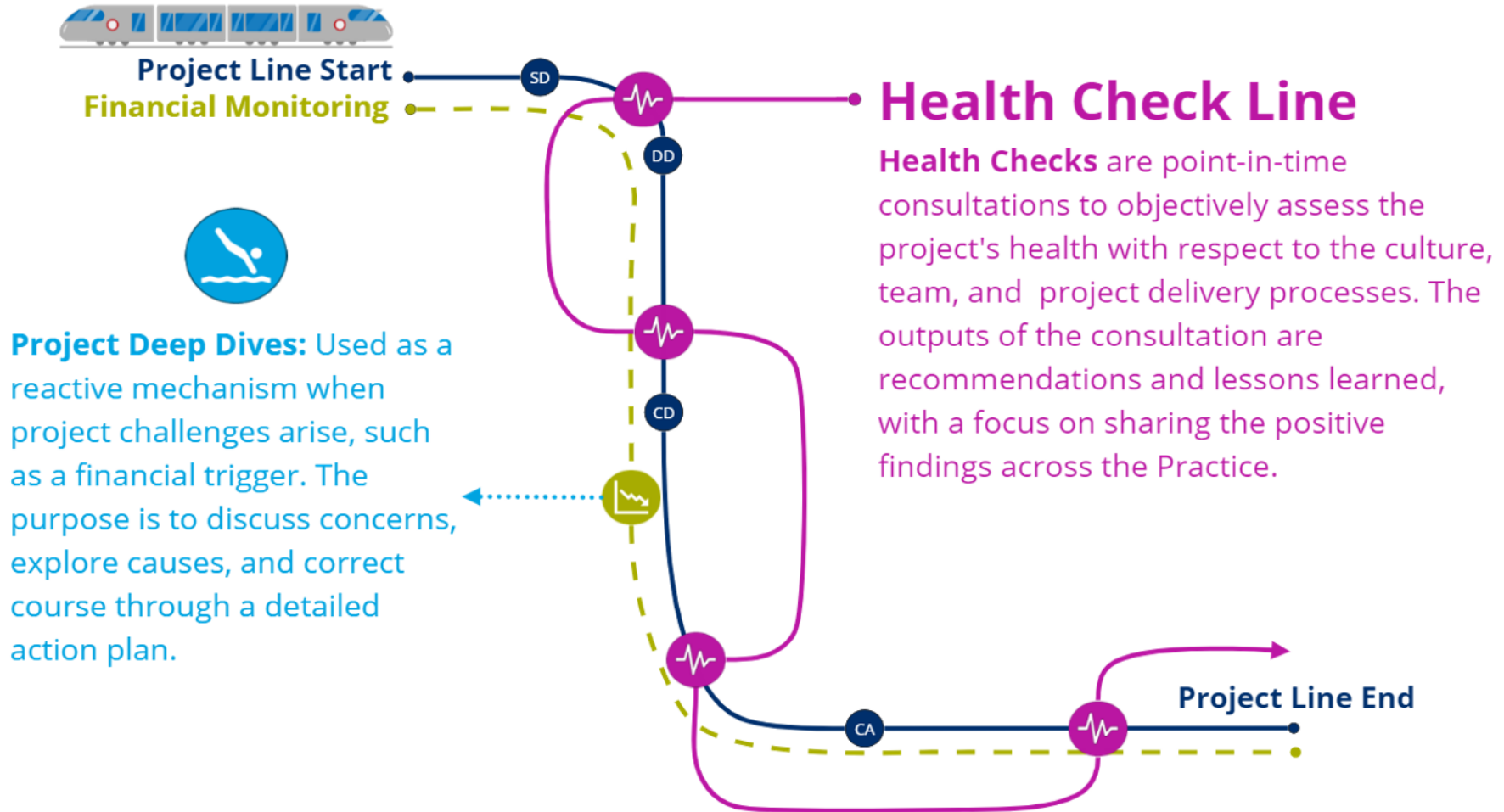
New and improved tools

- Updated features and automation
- Customized for different scales
- Risk and Issues Log
- Add Services Tracker
- Add Services Examples

Sharing and evaluation

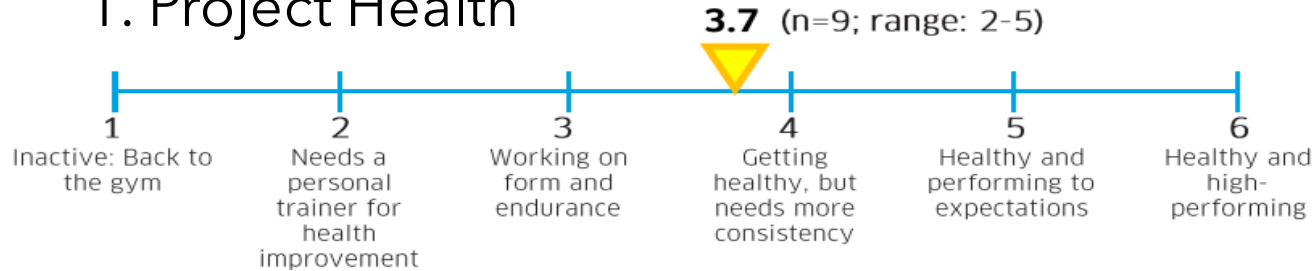


3. Project health checks



Project key learnings

1. Project Health



2. Planning

3. Communication

4. Culture

5. Onboarding

6. Lessons Learned

7. Project Management

- Work planning
- Additional services

Executive Summary

Introduction

The Lac La Biche Aquatic Centre (LLB-AC) participated in its first project health check from March 15, 2024, to May 1, 2024. Project health checks aim to improve performance, reduce inefficiencies, and increase project management consistency. This report summarizes the health check process, key learnings, and recommendations.

Project Overview

The LLB-AC project, selected for its complexity and unique characteristics, involved a fully integrated cross-studio team working on a progressive design-build project outside a major city. Key team members included Steven Oosterhof (Partner-in-Charge), Marion LaRue (Supporting Partner), Holly Shandruk (Project Manager), and all discipline leads. The health check aimed to assess the project's performance, identify successes and challenges, and offer recommendations for improvement.

Key Learnings

1. **Project Health:** The team self-reported a project health score of 3.7 out of 6, indicating that while improvements were made, the team is seeking more consistency. Financially, the project is performing well, with a 27.5% profit at 62% completion.
2. **Planning:** Early planning efforts, such as a two-day onsite design charrette and a DIALOG PM meeting, were beneficial. The Project Charter showed promise and can provide context in developing a project information sheet or project management plan. Though often with last-minute efforts, all project milestones have been met, indicating a need for better deliverable status tracking.
3. **Communication:** Technical discussions and discipline coordination were strong, but communication faced challenges, particularly within the cross-studio team. Recommendations include regular direct phone calls and reducing meeting frequency to enhance efficiency.
4. **Culture:** The project's diversity and collaboration were mixed, with experiences varying across the team. Ensuring inclusive and respectful decision-making processes is critical. Collaboration and decision-making documentation are recommended to improve integrated practice.
5. **Team Onboarding:** Onboarding new team members needed to be more consistent. Successful onboarding included thorough discussions on project scope and responsibilities. Consistent onboarding processes are essential for maintaining project momentum and clarity.
6. **Lessons Learned:** Applying lessons from previous projects, such as engaging with experts and integrating work plans, proved beneficial. For future projects, it is important to continue focusing on learning from successful and challenging experiences.
7. **Project Management**
 - a. **Work plans and Earned Value Analysis (EVA)** were partially completed across disciplines. Ensuring comprehensive work plans and EVAs for all disciplines is crucial for accurate progress tracking and financial management.
 - b. **Additional Services:** Managing additional services has been critical to the project's financial success. Detailed scope confirmation, impact analysis, and negotiation persistence were effective strategies.

Responding to the health check

Key Learning	Response
Strategic additional services	<ul style="list-style-type: none">• Add Services examples for the Toolbox• Connect with team for the 200-level session on managing change
Integrated work planning	<ul style="list-style-type: none">• Share work plan example through toolbox• Discuss scope splits /scope interfaces during PM Studio sessions
Tools	<ul style="list-style-type: none">• PMRT to develop:<ul style="list-style-type: none">➤ Risk and Issues Log➤ Revise Kickoff meeting agenda➤ Add Services Tracker• Heighten awareness and expectations of tools

Health check process lessons

Set up and delivery time

- Finding efficiency for setting up interviews

Second interviewer is critical

- Provides different perspective and keeps the conversation flowing

Participant enthusiasm

- Wow, do people love talking about their projects!

Structured vs organic conversation

- Promotes candor

4. PM community

Monthly studio workshops

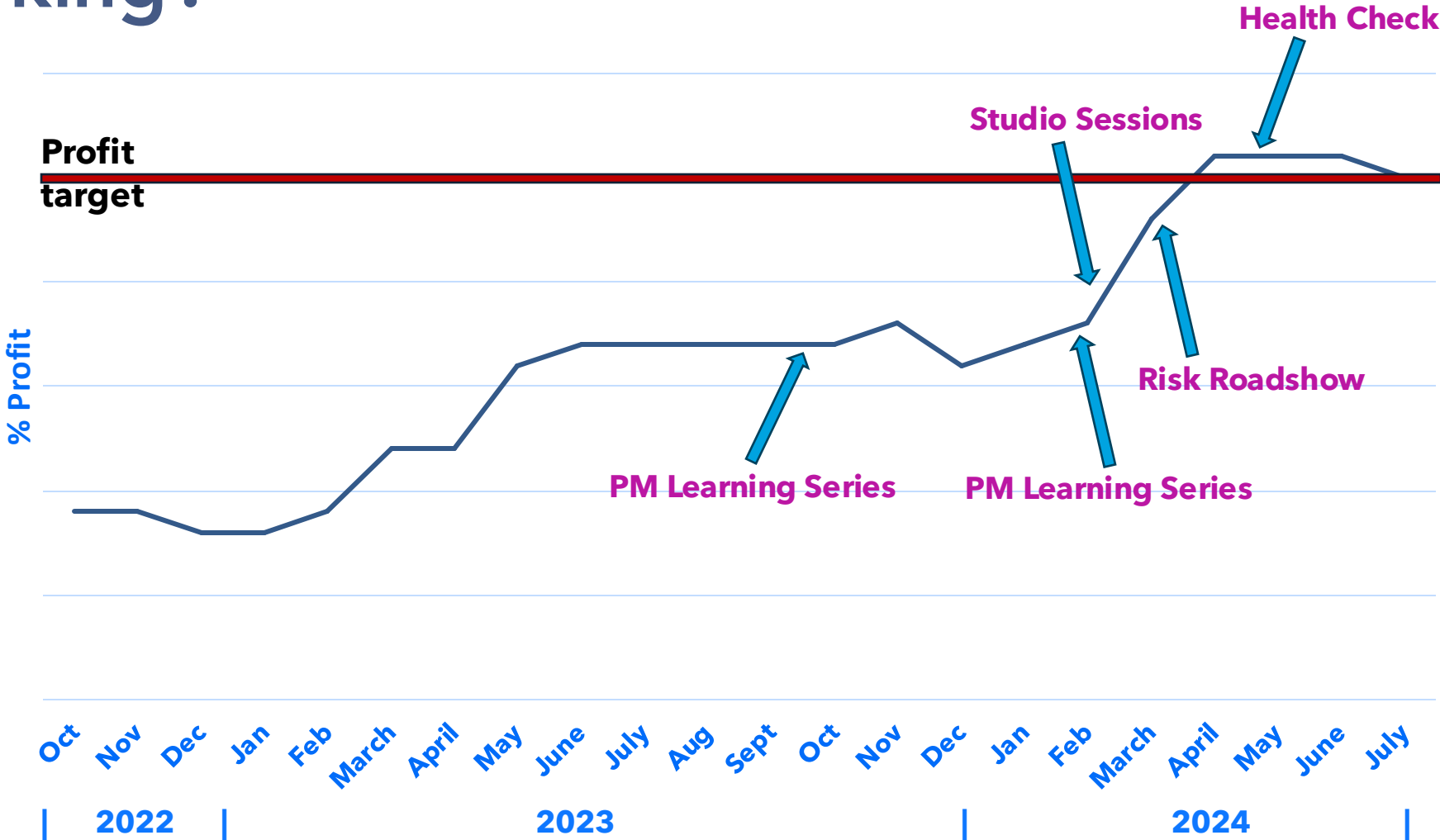
- Knowledge network
- An interactive open forum workshop
- Learning through discussion and real project examples
- Creating awareness of tools
- 10 - 25 participants, 1 hour

Risk roadshow

- Fostering PM conversation with risk conversations



Is it working?



Key messages

- 1. Align** your PM program with your needs and risk drivers.
- 2. Cater** PM education content through internal delivery – examples and stories are so valuable.
- 3. Connect** with teams to listen, learn, and support. Project success isn't just measured by profit.
- 4. Share** your successes (but don't forget about the challenges and where support is needed).
- 5. Deliver, evaluate, improve, and deliver again** – keep the momentum going.

Discussion & Sharing



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