TEAM FORMING (KICK-OFF) AND TEAM INITIATION

1.0 Why

While Lean/IPD projects always begin with a collaborative team selection process (Partner Selection), the member firms and individuals involved often are unfamiliar with each other. Lean/IPD projects benefit from a focused effort on team building, dynamics, role definition and vision-casting activities that are repeated whenever a new team is formed, new participants enter teams and whenever there are significant changes in team operations.

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Lean/IPD projects are managed by and employ various kinds of project teams—some permanent and some temporary—as a regular part of their operations. Each Lean/IPD project team is set up for a specific purpose, may have a specific assignment, and will be asked to deliver specific results. Teams are assembled from project participants who may have not worked together previously. Sometimes people not previously involved in a Lean/IPD process may be included in these teams.

Member firms typically come with historical management infrastructure and tools for scheduling, estimating and finance/accounting. Left unexamined, these separate systems may have redundancies, gaps or even be at odds with the project's integrated delivery objectives. Tools, reporting mechanisms and resource deployment must be examined, taken apart firm by firm, and put back together in service of the project objectives.

The Lean/IPD process, the way people work in the projects, the behaviors that are expected, and the cultural styles that characterize the projects are new to most building industry participants. These processes represent a significant paradigm shift from the past experience of most. For example, all team members are asked to provide input when they previously might not have had the authority to speak. Team members are asked to listen to ideas, processes, means and methods. All participants are challenged to drive results that would previously have been considered extremely difficult or impossible.

Project team formation is important in understanding the boundaries of the project and is more than a traditional project Kick-Off. With Lean/IPD projects, team formation does not happen in a single event or meeting; it is developed and evolves over time. There are also multiple purposes to this team initiation: determining design parameters, establishing team behaviors and structure, and developing Conditions of Satisfaction (CoS) metrics that monitor and measure the team's success.

2.0 When

The team Kick-Off is held before any project deliverables are completed and should involve all current project team members. As team members are added, they need to be onboarded. Onboarding allows new team members to understand and respond to current team structure and CoS. It also aligns new team members with the project culture and current team members.

3.0 How

The relationships, operating system and commercial terms of a Lean/IPD project differ significantly different from traditional project delivery. It is critical to inform participants of the new behaviors, tools and transformational change required to be successful in this effort. While no individual concept is complicated to grasp, change is difficult—particularly when it affects behaviors, relationships and previously successful individuals. Kick Off meetings will set the stage for new learning.

Successful teams have learned that the sooner all new team members learn about new behaviors, the better the outcomes. It is quite easy for the original members to forget that they have adopted new behaviors; the original members may expect new team members to automatically have this new knowledge. It is therefore crucial for teams to continue this learning for all new members as they are on-boarded.

Initial Kick-Off discussion topics should include CoS, design vision, team structure and team culture. It is helpful for the core project leadership to write draft or "straw man" concepts ahead of the Kick-Off, which the broader team can edit and improve. It is useful for teams to break out into smaller work groups to advance these concepts, then report back to the broader team about developing objectives, action plans, identifying roadblocks or needs, etc. This transfers ownership to the broader team, advances the initiative, and encourages collaboration and trust building in a learn-by-doing atmosphere. Teams should focus on their team development and broader concepts of success before diving into project details.

The following key points may not be addressed fully in the initial day(s) that a project team forms, but a discussion and plan for developing them should be part of the team-forming meeting.

Conditions of Satisfaction

Develop conditions that will leave all participants satisfied with the outcome of the project. These conditions usually include cost, schedule, community, environment, business objectives, relationship, and profit-based goals.

Design Vision

- Define design parameters in terms of quality and aesthetic direction.

- Identify key drivers to the design—what are elements customer can/cannot live without.

- Identify what value is to the ultimate end customer.

- Determine who makes aesthetic decisions and when they will be made.

Team Structure

- Define roles and responsibilities of team members.

- Define any hierarchy within the team.

- Define decision-making structure.

- Develop an on-boarding process for future integration of team members.

- Develop an effective Big Room.

- Develop a Target Value Design Plan.

- A3 log-Innovation (TVD) ideas.

- Identify risks/opportunities.

- Identify collaboration tools/methods to be used.

- Develop a BIM plan through early discussion, but at the right time with the right team members.

Team Culture

Key Principles

- Transparency

- Trust

- Aligning Minds

- Don't Design Alone

- Develop a learning-with-action/continuous-learning process.

- Norms, rituals, taboos.

- Build trust through intentional interaction.

- Conduct personal assessments of team members to understand how the team members can balance each other.

This initial effort is the groundwork for onboarding all who interact with the team. The more common knowledge and aligned the goals, the better the outcomes for all. The value of this effort cannot be overstated.

Quick Reference

For additional readings and information, please see the below information.

CHAPTER 8 – TEAM FORMING AND TEAM INITIATION
Additional Readings

7 Lean and IPD Panel

Barrett-Self-Organization and Synchronization at the Edge

Commercial Terms to Support Lean Project Delivery

Contracting for Lean in Design Build

High-Performance Building Green Rating Systems

Hyper-Fast Delivery – USACE – Sherman Alternate Care Facility

Integrated Project Delivery An Example Of Relational Contracting

Lean production, value chain and sustainability in precast concrete factory - a case study in Singapore

Owner Perspectives-UCSF

Presentation 02-The Big Room-final

Project Definition

Psychological foundations for incentives

Schedule for Sale Workface Planning for Construction Projects

Southern California Owners Forum

Transitioning to Integrated Project Delivery Potential barriers and lessons learned