ADVANCED WORK PACKAGING

IMPLEMENTATION TOOLKIT





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Section One: Learning About Advanced Work Packaging (AWP)

1 Overview

This is the first deliverable in the AWP Implementation Toolkit. The intent for this toolkit is to provide help and guidance for people and companies looking to start their AWP journey. Each deliverable will be structured as a logical, sequential part of the process, and the resulting toolkit will provide a step-by-step guide to AWP implementation and execution.

In this deliverable, we will start our journey by learning what AWP is, and how to access the abundant available information on AWP that exists from various sources and providers.

2 Key Concepts

AWP began as a Workface Planning (WFP), and was initially developed in Canada as an effort to reverse declining field productivity by improving execution planning and efficiency. This concept was then extended into a partnership between the Construction Owners Association of Alberta (COAA) and the Construction Industry Institute (CII).

AWP was recognized as a CII Best Practice in 2015.



There is a LOT of information about AWP, so it can be difficult to know where to start. Below, we will focus on the key information sources and most easily accessible information.





3 Construction Industry Institute (CII)

CII is the primary source for AWP information and the organization that lists AWP as a Best Practice.

Access

Any of the information below relating to CII is for members only. A current CII membership is required to open/download the research papers and tools.

Website

https://www.constructioninstitute.org/resources/advanced-work-packaging-

(awp)-overview

The AWP information on this 'landing page' is grouped into three categories:

- Discover For new users and those seeking information about AWP.
- Engage Tools and information for those looking to implement AWP.
- Expand For organizations looking to expand AWP across their portfolio.

There are several publications or tools within each category:

Discover

Product	Description
AWP Education Primer	A starting point, to understand the basic principles. ("AWP 101"). Easy to read summary of the key concepts and terminology.
AWP Acronyms & Definitions	Learn to "speak AWP". This glossary provides a reference guide to understand the acronyms and terms used in AWP.
RT-272 – WorkFace Planning as a Best Practice	Where it all began, and the starting point for AWP. This document covers the Workface Planning model and its application.
RT-319 – AWP as a Best Practice	The document that led to AWP becoming a Best Practice. Evaluating the impact of AWP on project performance, and understanding the relative benefits relating to AWP maturity.
RT-365 – Overcoming Implementation Barriers	Identification of potential solutions to overcome AWP implementation barriers, including the publication of the AWP Concierge.





Engage

Product	Description
RT-300 – AWP for Frontline Supervisors	Understanding the impact of AWP on forepersons, and how AWP helps frontline supervisors to better align with stakeholders and plan work.
AWP Maturity Level Benefits Tool	This tool explores the use of a "crawl, walk, run" approach to AWP implementation, including the various levels of maturity and their associated costs and benefits.
AWP ROI Tool	Calculate the costs and benefits of implementing AWP on your projects. Assess the ROI for the project and justify the decision to roll it out.
AWP Concierge	The tool associated with RT-365 (above), regarding the identification of potential solutions to overcoming AWP implementation barriers.

Expand

Product	Description
RT-TC-03 – Supply Chain Visibility	Understand how to integrate supplier data in your AWP implementation, and the benefits for digital threads.
WG19-01 – AWP Data Requirements	Identify and standardize the data requirements for AWP, throughout the project lifecycle, to ensure that the data can fully support mature AWP.
RT-363 – Integrating the Supplier Chain	Align the supply chain strategy to support the Path of Construction. Identify critical suppliers that should be engaged early.
RT364 – AWP for C&SU	Understand the impact of AWP on Commissioning and Start-up, to ensure that the Path of Construction aligns with the start up sequence.





Section One: Learning About Advanced Work Packaging (AWP)

Committees

CII also has a number of active AWP Committees and Working Groups, who are exploring new and innovative developments in AWP implementation. These groups are open to new members, so if you have an interest in participating, or want to network with other members, click on the link below.

https://www.construction-institute.org/resources/advanced-work-packaging-(awp)-overview/network-with-the-awp-experts

Community for Business Advancement (CBA)

CII hosts a monthly meeting of the CBA, where an array of speakers provide updates on developments and latest trends in AWP. To sign up, use the link below. https://www.construction-institute.org/groups/communities-for-business-advancement/advanced-work-packaging

4 Construction Owners Association of Alberta (COAA)

The other long-term and the preeminent source of AWP and workface planning information. COAA has a comprehensive library of AWP information and reference material.

Access

The COAA library is free to access and does not require any membership.

Website

https://www.coaa.ab.ca/library/advanced-work-packaging-summary/

The library content is not organized into groupings or categories in the way that the CII AWP website is, and some of the information is a little dated. But the simple fact that it is free to access and has a large number of tools, checklists, presentations, job descriptions, procedures and templates makes it a valuable source of information.

To use the library, the best option is to browse all the available content and determine which elements might be of use to your company.







Section One: Learning About Advanced Work Packaging (AWP)

5 AWP Institute

The AWP Institute was established in 2013 as a not-for-profit information source relating to Advanced Work Packaging.



Access

The site and its contents are free to access, and do not require any membership.

Website

https://www.workpackaging.org/

The website contains a large number of presentations, articles, resources, interviews and publications relating to AWP and its implementation.

AWP Conference

The AWP Conference, presented by Group ASI, is the longest-running conference dedicated to Advanced Work Packaging.

Originally an annual AWP Conference in North America, the events have now been expanded to include specialized summits relating to AWP for Power & Utilities, AWP for the Mining Industry, AWP for Infrastructure Projects, and AWP + Lean.

Access

Refer to conference event listings for dates, locations and pricing.

Website

https://awpconference.com/

Concord Academy

Concord Academy provides the only self-paced AWP training available on the market. The courses offered



include AWP 101, AWP Fundamentals, AWP Champion, and Workface Planning.

Access

Refer to the website for course access and pricing.

Website

https://academy.tconglobal.com/





Section Two: Building a Business Case

1 Overview

Our first deliverable looked at the documents and knowledge base needed to get started with understanding Advanced Work Packaging (AWP).

In this second deliverable, we will continue to track the path of AWP implementation within a company by looking at what is needed to get management approval to start using AWP.

2 Key Concepts

There are three key elements to this deliverable:

- AWP Overview You need to be able to explain to your management team what AWP is and how it will benefit your company.
- Business Case Once you have explained the basics of AWP focus on the financial aspect of implementation.
- Implementation Plan Provide a very high-level outline for the implementation plan.

The intent of this exercise is to get management approval to implement AWP. So you need to set this up in such a way that you get clear authorization to proceed and that you have aligned on expectations and the high-level plan.







3 AWP Overview

We have provided a slide deck to show an example of what to include when presenting the business case to your management team as part of this request for approval. It includes the following major considerations:

- Problem Statement Start with the problem, to understand what you are trying to solve. Use industry data as a basis, but tailor to your company wherever possible. The more specific it is to your company, the more that management will identify with it.
- Solution Once you have explained the problems you are looking to solve, provide an overview of what AWP is, and how it can address those problems. Be sure to spell out that this isn't a new concept; it has been a CII Best Practice since 2015 and many organizations have implemented it. If you are a contractor, you risk being left behind by your competitors if you don't implement it.
- Provide details of the fundamental structure of AWP, with a focus on constructiondriven planning and construction-driven engineering. The "Advanced" part of AWP only works if construction input is being considered early in the project cycle.
- AWP Maturity will be a key concept in the management meeting. The potential benefits
 of AWP Implementation (the oft-quoted 10% saving in TIC) should only be expected for
 AWP-mature organizations. You won't get there on your first implementation. So
 temper the expectations, but make sure it is understood that the only way to get there is
 to start.

4 Business Case

To create the business case, we looked at Return On Investment (ROI), to show that the cost of implementing AWP will be outweighed by the savings. To do this, we used two tools:

 The CII AWP ROI tool was developed in 2021 by the Performance & Benchmarking subcommittee, chaired by O3 Solutions AWP experts, with input from multiple Owners, Contractors, and service providers. This tool uses basic information about project size (Total Installed Cost – TIC), project duration, AWP implementation category, and organizational maturity. These data points are combined to create a projected ROI. (Note: CII membership is required to access this tool). For this exercise, we selected a sample project of \$150 million TIC, where we would implement full AWP, and recognized that our fictitious EPC company was at the lowest level of AWP maturity.







We made some minor adjustments to some of the default values, to illustrate that the tool can be configured to project conditions. (Note: This is typically done in consultation with an O3 team member)

The result was a projected saving (after cost) of \$4.8 million.



2. The second tool used was the original ROI tool developed by O3 Solutions. This tool looks further into the various areas of specific saving and considers the difference between implementing AWP using a manual approach (without software) and using a purpose-built AWP software like O3.

The same project details were used, and adjustments were made to the default values, to again show the configuration capabilities of the tool.

The result was a projected saving (after cost) of \$1.8 million if using a manual approach, and \$6.3 million if using a full technology approach.

5 Implementation Plan

Next, the slides moved on to a brief overview of the sequence of steps for the implementation of AWP. This establishes that AWP will be rolled out to a pilot project first, after the development of company procedures and the selection of AWP technology.

The pilot project will serve as a basis for lessons learned and continuous improvement, before seeking management approval to implement AWP across other projects.

It will be important to discuss what success looks like for the pilot project, and what the expectations are from the management team. Ensure that everyone is on the same page about the measurable results, and what outcomes from the pilot will be needed for the management to approach roll-out throughout the company.

Lastly, we provided a snapshot of the AWP organization chart for the pilot project. This is important because you need to be clear on the need for new and dedicated personnel, where they will reside in the project organization structure, and how long they will be needed for the project. (Note: These additional positions have been included in the costs of the ROI, so these are already part of the business case).





6 Questions and Decision

Provide the management team with an opportunity to ask any remaining questions.

Then push for a decision at the end of the meeting. Try to get a commitment from management that they will support this process, and that they will nominate a corporate AWP Sponsor from the management team to act as the figurehead and vocal supporter for AWP within the company.







Section Three: Choosing a Pilot Project

1 Overview

Our first two deliverables provided knowledge about AWR and management approval to implement it.

In this third deliverable, we will look at what you need to consider when selecting a pilot project for AWP implementation.

2 Key Concepts

There are two key elements to this deliverable:

- Pilot Project selection by mandate When you have no choice about which project to use as your pilot.
- Pilot Project selection by choice When you get to decide which project to implement AWP on, from a range of possible options.
- The intent of this exercise is to understand some of the considerations when choosing the AWP pilot project.

•

We will also look at some of the on-going considerations for project selection, after the pilot.





PILOT PROJECT SELECTION BY MANDATE

(Note: If you represent the Owner organization, and you don't have a directive from your management team about which project to implement AWP on, proceed to the next section). This is certainly the less-preferred method for the selection of the pilot project. In this instance, you have no choice. Many contractors find themselves in this position when working with an Owner who is mandating AWP on a project. If you want to win the work, you will get on board.

This is a tough path, because you are learning on an active project, and will likely be assessed by the Owner for adherence to their standards.

The first thing to do in this case will be to make sure that you have a detailed understanding of what the Owner's expectations are. These should be clearly identified in the bid documents for the project, though it should be noted that some Owners will simply say "Project will use AWP", without any detail as to the plans and expectations.

Create your AWP plan to meet the agreed expectations, but also look to understand where there is room for maneuver, especially if that allows you to retain ownership of parts of the process. (e.g. Does the Owner mandate that IWPs are between 500 & 1000 hours in every case, or is a guideline? Or are they silent about that requirement?)

You could also find that, even without an Owner mandate, your Company's management team decides which project AWP should be used on, based on internal concerns over risk or the achievability of project goals.

In this case, make sure you understand the requirements and expectations from the management team, as we discussed in the previous deliverable. Make sure that management understands that this is the first implementation, and will be used as the basis for lessons learned going forward. This understanding should also be used to temper the expectations about the benefits of AWP implementation. You aren't going to save 10% TIC on your first go, so make sure they know that, and set realistic goals.







Pilot Project Selection By Choice

This is certainly the preferred route. In this instance, you can make your own decision about the most suitable project for the implementation of AWP. You can learn your lessons and refine your plan on projects that don't have a mandate, either from an Owner or from your management, so that by the time you are bidding on a project where AWP is required, you are well-positioned to show your expertise.

For selecting a pilot project, consider these key elements:

- Timing is critical. Avoid trying to implement AWP halfway through a project. If you are considering a project that is just about to start construction, you have already lost a lot of the value that AWP can bring. So look for a project that is in the early engineering stages. (If you are the construction contractor and aren't brought onto the project until the construction phase, this will sadly be a moot point).
- It is great to look for a project in the Front End Loading (FEL) stages, but you also need to make sure that you are selecting a project that is likely to go ahead. So avoid projects that might fail to pass a stage-gate review, either through lack of technical definition or, more commonly, bad economics.
- Select a relatively short project. Part of the value of a pilot project is the ability to learn lessons, and use those lessons as part of a continuous improvement cycle. If you select a five-year mega project, it will take a long time to get useful feedback.
- Pick a project with an appropriate level of complexity, where early construction input can have a significant impact on the outcome. Avoid, for example, a project that is a single discipline, single-vendor project (like a new electrical building), where there is not enough complexity for construction planning to make a meaningful contribution.
- Select a project that forecasts an enticing Return On Investment (ROI) for AWP. We covered this in the last deliverable, and you should already have included it as a consideration in your business case. But if you have several good projects to choose from, this can be a useful tie-breaker.
- Look for a pilot project that includes the key disciplines that you want to introduce to AWP. It might be, for example, that your management instruction is to use AWP to improve pipe installation. That being the case, there is no point picking a pilot that has limited or no pipe scope.
- Lastly, but by no means least, consider the people. The project team for the pilot will help to make or break your implementation. Look for a project whose team has a proven track record of being able to embrace change, can learn new processes, and quickly understands the value that AWP can deliver. By seeking an adaptable leadership team, your pilot project will have the best chance of success and will help to avoid resistance to change.



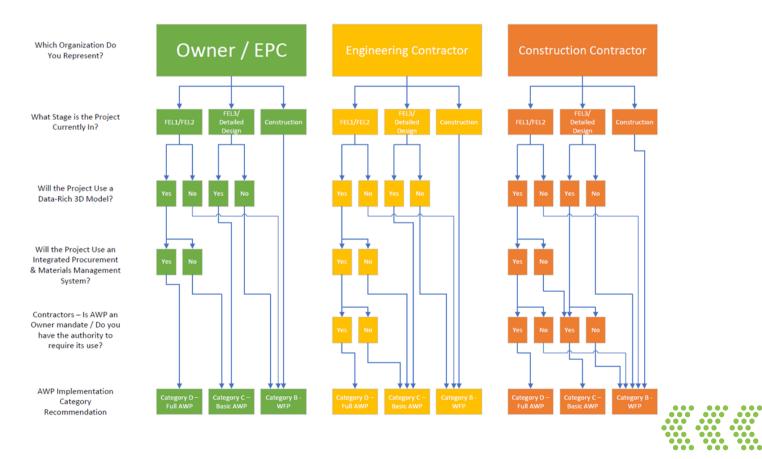


Type of AWP Implementation

Not all AWP implementations are the same. Along with selecting the right project, you need to make sure you select the right approach to AWP, based on the project conditions. The Maturity Level Benefits Tool, developed by CII's Performance & Benchmarking Subcommittee, identified four categories of AWP implementation, and their associated benefits.

- Category A No AWP This is the baseline, where projects are performing using existing, non-AWP practices. This should be considered for projects that would not see a benefit from implementing AWP.
- Category B WorkFace Planning These are the projects where AWP implementation is limited to the field scope.
- Category C Basic AWP This includes the field scope (WorkFace Planning) as well as starting to bring some of the AWP planning concepts into the engineering stages of the project.
- Category D Full AWP Implementing all elements of AWP from early engineering to commissioning and start-up, to get the full benefits of the program.

So which one will be right for your project? That will depend on some key information. Use the flow chart below to determine the best path.







Selection Criteria – After the Pilot

Selecting the right pilot project is critical to the success of your AWP implementation. But after the pilot, you will need to assess which other projects to roll out AWP on. For some organizations, it will be a simple case of mandating AWP on all projects. For others, it may require certain considerations, particularly if your project portfolio is varied, and includes both large and small projects.

To do this most efficiently, CII's Performance & Benchmarking Subcommittee has developed an AWP Selection Criteria Tool that allows you to answer a series of questions about your projects, which will then provide a recommendation regarding whether or not to perform AWP on the project, and which category of AWP implementation to use.

Category	Question	Description	Response	Score
	Owner Requirement	Is AWP an Owner requirement for this project?	No	0
Project Overview	Organization	Which organization do you represent on this project?	Engineering Contractor	3
	Project TIC Value	What is the total installed cost of the project? (Enter value)	\$100,000,000.00	20
	Interfaces	How many contractual / company interfaces does the project have?	Two to four. Owner to Engineering, Fabrication, Construction	3
Timing / Schedule	Schedule Achievability	Is the project schedule aggressive?	Some concern over ability to meet schedule	1
Timing / Schedule	Engineering / Construction Overlap	Will Engineering be complete before Construction starts?	Standard fast track. Engineering work passes straight to Construction	5
	Engineering Contract Strategy	What is the contracting strategy for Engineering?	Reimbursable (Cost Plus Fee)	2
Contraction	Engineering Contract Status	Has the Engineering Contract been issued? Was AWP included as a requirement?	Yes - AWP Language was included	5
Contracting	Construction Contract Strategy	What is the contracting strategy for Construction?	Lump Sum (Fixed Price)	1
	Construction Contract Status	Has the Construction Contract been issued? Was AWP included as a requirement?	No	5
	Procurement Risk	What is the project procurement risk profile / exposure?	High - Many long lead / risk items. Significant potential for project impacts.	10
Procurement	PO Status	Have material / equipment POs been issued? Was AWP included as a requirement?	Yes - AWP Language was NOT included	1
	Fabrication / Modularization	Does the project have a significant off-site fabrication / modularization component?	Yes - Significant execution risk from off-site work	5
	AWP Experience - Organization	What is your organization's level of experience with executing AWP?	1 - Early Implementation	1
	AWP Experience - Project Team	What is your project team's level of experience with executing AWP?	Early Implementation (First time or limited experience)	1
Experience	Engineering Contractor Experience	Does the Engineering contractor have experience with this scope / technology?	Core Competency	0
	Construction Contractor Experience	Does the Construction contractor have experience with this scope / technology?	Some Experience / History	2
	Contractor / Owner History	Has the Owner worked with this Contractor before?	Worked Together Few Times	3
	Number of Contractors	How many construction contractors will have contracts directly with the Owner / CM?	Two primaries, plus support contractors.	3
Execution Complexity	Number of Disciplines	How many discrete disciplines are included in the scope of work?	Three or more	5
	Greenfield / Brownfield	Is the work being performed in a Greenfield or Brownfield location?	Brownfield	3
	Turnaround / Outage Integration	Is the project integrated with a Turnaround or Maintenance Outage?	Some integration required with turnaround or outage	3
	Geographic Distribution	How is the construction scope distributed geographically?	Work Distributed Throughout the Battery Limits of a Single Operating Unit	5
			Total Score	87

Source: Construction Industry Institute - AWP Selection Criteria Tool

For those who are not CII members, this concept can be adapted to your organization. The responses, scoring (weighting), and the recommended levels for AWP implementation category can be tailored to align with your company's requirements and standards.

Using or creating a tool like this will provide standardized, repeatable, and auditable justification for the implementation (or non-implementation) of AWP on your projects







Section Four:

1 Overview

This fourth deliverable represents the first step in implementing AWP, following approval from Senior Management. The AWP concept has been agreed to, and now you have to start executing your process.

To help you achieve that, this deliverable will provide a procedure for AWP that you can use and configure to your requirements. A lot of people start with a blank piece of paper when preparing an AWP procedure, and struggle to get started with their implementation, or they spent months (sometimes years) working with an external contractor to develop an internal procedure. Hopefully this document will provide you with a starting point, and a solid foundation aligned with the best practice

2 Key Concepts

The procedure is intended to be a step-by-step guide to the execution of AWP on a capital project. It is arranged in sequential order, showing the AWP deliverables at each project stage. For each project, you can start at the top and work your way through each step. Each section represents a deliverable, and for each deliverable there is a description of the goal, deliverable, and process. This will help your teams to understand what needs to be created, what purpose it will serve, and how to create it. Some important things to consider:

• This procedure document is a starting point. It is unlikely to be the final end product for your company. You can modify it to meet your needs, including reference to your existing tools and processes for project execution. The more closely that you can align the wording to your existing company standards, the easier your teams will find to adopt it. Show how AWP will fit in with the way you currently execute projects. Annotate the procedure with references to your existing standards, and include diagrams where relevant.



Section Four: AWP Procedure

- A RASCI matrix is attached to the procedure. This document lists each deliverable and shows who is Responsible, Accountable, Support, Consult and Inform. This will allow each person on the project team to understand their role in the execution of AWP on the project, and provide important early buy-in from the team. AWP is a highly collaborative process, so creating clear alignment on who will do what, and how each deliverable may span multiple individuals and stakeholder organizations is incredibly important. The role descriptions and responsibilities are recommendations only, and will not align with all organizational structures. Use this RASCI as a basis, and modify to support your company structure.
 - The procedure has been written as though it is created and issued by an Owner organization. This is partly because we had to choose one organization to represent, and partly because the Owner should always be the one setting the standard for AWP on a project. That being said, if you work for an organization that is not an Owner, you can easily rewrite and reconfigure it to meet your needs. For example, for Construction or Engineering contractors, just change the "Here is our requirements" wording to "Here is our standard execution process for AWP".
 - Not all contractors will be involved in all stages of AWP. If, for example, you represent a construction contractor and you are never included in the engineering stages, you may be able to shrink the procedure to just the relevant construction phase. If that's the case, use the preceding elements like a bullet point list that tells the Owner and Engineer what your expectations are for how they will set the project up for workface planning success during the early stages. It also means that you will have a future-proof document to help you when are invited to participate in the early planning stages.
 - It is impossible to write a procedure that will cover every possible contractual model that could be used on a project. For example, projects executed using an EPC model will mean that the deliverables associated with the Engineering contractor, Procurement contractor, and Construction contractor are all merged into one organization. Again, the procedure can be configured at an organizational level or a project level to represent your needs. Most importantly, in this scenario, make sure that the RASCI matrix reflects the planned roles and responsibilities for the project, across all necessary stakeholder organizations.
 - The procedure is set up using the standard stage-gate process for a typical capital project, with much of the content aligned to the technology of oil and gas projects. If this does not represent the business your company is in, the detail can be modified to reflect the key implementation aspects for your company. But the basic structure, sequence, and key considerations should be universal for AWP projects across any business.





Section Four: AWP Procedure



The procedure assumes the use of software for work packaging. The use of work
packaging software will greatly reduce the implementation time, learning curve and
effort involved in establishing AWP on your projects. For those projects that will execute
without work packaging software, excel spreadsheets (or equivalent) can be used for
some of the deliverables such as IWP Release Plan. The IWPs themselves can be
created manually too; just bear in mind that this will take a lot more time and many
more planners. If you would like to consider the use of work packaging software, but
are not sure if it makes sense for your company, please reach out to O3 and we can
work through the Return On Investment calculations with you.

3 Uses for the procedure

If you are the Owner, this procedure can be included in bid and contract documents to inform all contractors (Engineering, Procurement and Construction) of your AWP requirements.

If you are the Engineering, Procurement or Construction contractor (or any combination thereof), this procedure can be used to show the Owner (or EPCm) how you manage AWP on your projects, and what your standards are for its use.

If you need assistance configuring this procedure to your standards and internal company processes, please don't hesitate to contact us.







Section Five: AWP Workflows

1 Overview

This fifth deliverable is intended to accompany the AWP procedure, by providing graphical workflows of the key processes within the AWP implementation process.

These workflow diagrams are essentially pictorial representations of the most critical processes detailed in the procedure, and the roles and responsibilities included in the RASCI chart. For many people a diagram will provide a more easy-to-understand reference guide, or a simple reminder of the details of the process outlined in the procedure. These workflows are intended to supplement the procedure, not to replace the need to read it.

2 Key Concepts

The workflow diagrams target the six aspects of AWP implementation that will most benefit from this graphical illustration:

- Path of Construction
- EWPs / PWPs / CWPs
- Create IWPs
- IWP Management
- Change Management
- IWP Completion









Some important things to consider:

- Where reference is made to IWPs in the last four workflows, this same process can be applied to Test Work Packages (TWPs).
- The roles and responsibilities detailed in the workflows align with the RASCI provided with the AWP procedure in Deliverable Four. If you have made edits to the RASCI and changed the roles and responsibilities, you may need to edit these workflows to align.
- The workflows make the same assumptions as the AWP Procedure and RASCI relating to the project contracting model. As with those documents, the workflows can be configured (by the end user) to match the project details.
- The workflows were created in Visio. Native copies are provided that can be edited by those with access to that software. PDF copies are also provided for reference.







Appendix

Section 1: Learning About AWP

• None

Section 2: Building a Business Case

Attachment: AWP Business Case & ROI.pptx

Section 3: Picking a Pilot Project

• AWP Selection Criteria Flow Chart.pdf

Section 4: AWP Procedure

• AWP Procedure.docx

Section 5: AWP Workflow

Workflows.vsdx
 Six individual workflow files (Named A through F) in PDF format

