

eBook

# Transforming Your WorkFace Planning Program with Digitization & Automation



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# Table of Contents

- **Introduction**

- **Configuration**

How to eliminate manual processes

- **Automation**

How to create a Work Package, Constraints, Approvals, Release and Track

- **Visualization**

A full view of all of your projects in your portfolio

- **Standardization**

How to create templates for any project or job

- **Conclusion**



# Introduction

The process of digitizing and automating Work Packaging makes the job of a WorkFace Planner exponentially easier.

Automation standardizes workflow through the use of tools and processes for the work process. This can be applied to projects of all sizes from small to mega projects.

Digitizing and automating Work Packaging begins with an easy input of the work package types and specifically Installation Work Packages.

**In this ebook, we will share with you what we've learned as we've worked alongside clients in industrial construction. O3 has been battle tested in the field with over 200,000 work packages that have been created and executed.**



# Configuration

## Adjust Current Processes to Incorporate AWP Best Practices

Advanced Work Packaging (AWP) is a proven method to improve efficiency and streamline the sequence of work for construction. To successfully implement AWP, you should incorporate the best practice into your existing processes and procedures. It may be time to re-configure your existing tools and systems to address the new process requirements. Some examples of configuration changes include:

The ability to create custom repeatable processes for Owners, Project Teams, and WorkFace Planners no matter what when building work packages makes work more efficient.



### Development Steps

- the objective of the step
- the order in which the step should be completed
- the estimated time to complete the step
- if it should be auto-created for every work package

### Pre-Conditions & Transitions

- determine if an entity must meet requirements before it moves to the next status
- pre-set list of statuses available when moving from one status to the next

### Configurable Forms

- add or remove fields as needed to simplify the view for planners
- adjust level of detail as AWP maturity grows



### Configurations Should Consider:

- ✓ Who should have access to what information and when
- ✓ What data should be required versus optional
- ✓ What processes are standard versus project-specific



# Automation

## Introduce Automation to Make WorkFace Planning More Efficient

Managing multiple work packages across various systems, tracking constraints, and providing updates to key stakeholders manually can waste valuable time, cause duplicate entry, and introduce human errors. The use of automation can help WorkFace Planners by cutting down on the manual effort of managing their work.

The following are a few suggestions for ways to automate your work packaging program:

### Automated Constraints

Pre-defined constraints should include:

- default days due
- constraint owner role assignment
- if the constraint should be marked as a "hard" constraint (work package cannot be released unless the constraint is cleared)
- certain constraints auto-created as predecessors



Using automated constraints and approvals can reduce the chance of critical steps being missed throughout the life-cycle of a work package.

### Automated Approvals

Pre-defined approval steps should include:

- submitter role
- approver role
- status of the entity once it is accepted
- auto-assigned based on the contract, discipline, or work package purpose



### Should all constraints be automated?

No. Automated constraints work best when you are developing a specific work package type that always includes a particular constraint. (Example: Piping Installation Work Packages always include a material constraint.)



# Visualization

## Make Data More Meaningful for Each Stakeholder with Visual Tools

Moving from paper to digital Advanced Work Packaging and WorkFace Planning processes, provides Project Managers and WorkFace Managers with unprecedented access to data. Data on work packages, constraints, and specific action items supports more accurate planning, more efficient and meaningful meetings, and proper resourcing. The following are examples of visual tools that improve the decision-making process:

### Gantt Charts

- see the area, discipline, estimated hours, number of open constraints, and the planned start and finish date of a work package
- apply filters to focus on the right work at the right time

### Team Goals

- keep objectives and progress front and center with visual reminders
- assign goal owners and priority
- set estimated and actual start and finish dates
- include risks and action plan

### Watchers

- receive an automatic email when a change is made on an item you're watching.

### Labels

- add a topic name, role, area, work package type, meeting name, or other indicators to quickly find related items

### "A Picture is Worth a Thousand Words"

The visual representation of multiple sets of data allows you to go beyond the 'one-thing-after-another' nature of verbal language. When all relevant information is presented together, it's easier to notice patterns and trends and more quickly make decisions.



# Standardization

## Determine Required Data and Save Time Launching AWP for Your Project

Standardizing AWP and WFP processes for your organization are paramount to establishing and scaling a successful program. There are several areas that could and should be standardized for your company. Some common items or processes that can be standardized include:

### Work Package Templates

- standardize required information for safety, quality, manpower, permits, equipment, material, etc.
- define predecessor and successor package types



Standardize your meetings with dashboards to enable data-driven decisions with the most important information always at your fingertips.

### Project Templates

- right-sized by project type, duration, scope, and/or level of AWP maturity
- requirements by region, contract type, etc.
- pre-set administrative settings, roles and permissions, and required data fields

### Reporting Dashboards

- individual or role-based to manage specific tasks, action items, or constraints
- manager level to provide oversight into the performance of a specific team or area
- executive level to provide visibility into the health of the project and the AWP implementation



### Where should I start?

The best place to start is with data fields. Multiple contractors on a project may create work packages differently. Creating a common set of required data fields will help standardize packages across the project.



# Conclusion

Introducing a new process like Advanced Work Packaging impacts multiple teams across the entire lifecycle of a project. The implementation itself should be a journey to be taken one step at a time. Once you have adopted the fundamentals, you should look for ways to increase efficiency and streamline the process. Things to consider:



## Configuration

Help outline a clear process, pre-set permissions based on role / access



## Automation

Reduce errors and duplicate entry, avoid missing critical items



## Visualization

Create transparency and insight to support better decision making



## Standardization

Establish required data fields, create templates to reduce time to startup

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## Content Created by O3 Solutions

O3 helps Owner / Operators, EPC Firms, and Contractors building industrial capital assets transform the way they do business with agile and digital technologies. O3 helps identify project risks and potential constraints and optimizes the performance of a project team with real-time analytics, data visualizations, and digital tools. O3 provides solutions and services within a single software collaboration platform to leverage best practices in Advanced Work Packaging and Agile Project Management to provide value at any project phase or across an entire enterprise.



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# More Resources

In order to drive the success of your Advanced Work Packaging or WorkFace Planning program, clear expectations, desired goals and objectives, and best practices should be set and communicated across the enterprise. Likewise, stakeholders should be held accountable for their performance.

O3 provides solutions to help you better manage your program or project, no matter where you are in your AWP journey.

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