Planning Accuracy in STOs

Stephen Taylor and Coen Wessel
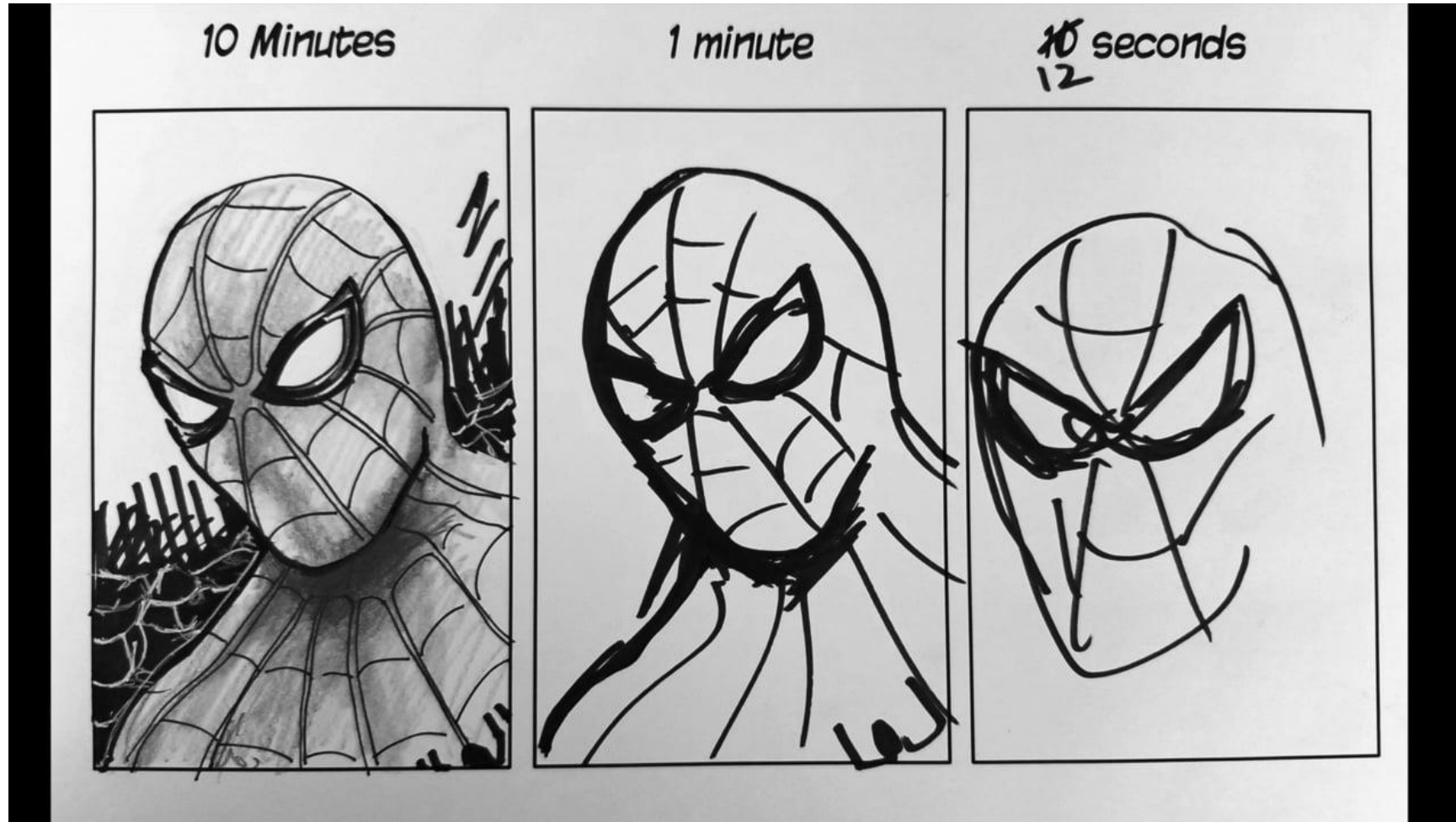
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Context

Scope identification
- Collect TAR worklist

Scope load management
- STO Analysis

Work package planning
- Work package planning tasks
- Estimate, Budget, Bidding

Scope planning
- Scope planning tasks

Scope approval
- Scope approval workflow

Scheduling
- Interfacing

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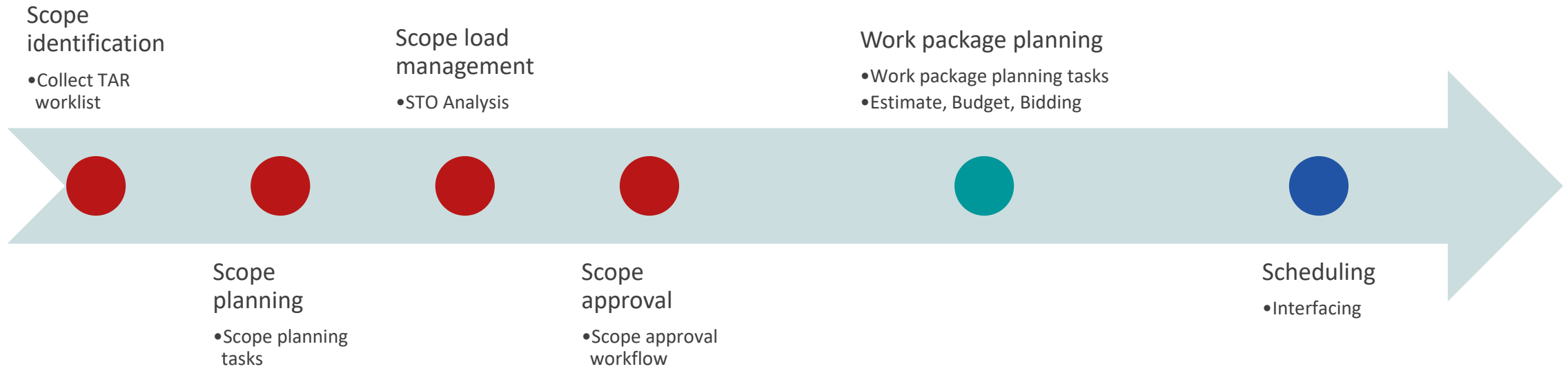
How accurate can your planning be?

How accurate do you need to be?

- Time (must)
  - Timeframe ↓ = Room for error ↓ Accuracy must↑
  - Timeframe ↑= Room for error ↓ ↑ Accuracy ↓
- Scope (can)
  - Scope ↑ = Accuracy ↓
  - Scope ↓ = Accuracy ↑

- Team (can)
  - Experience ↑ = Accuracy ↓Experience ↓ = Accuracy ↑

- Software Tools (you need)
  - Number of tools ↑ = Transparancy ↓ Accuracy ↓

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Tips

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Templates

- Increase
    - Consistency
    - Predictability
    - Flexibility
- Reduce data entry time
- Use this room for decision making
- Maintain templates as part of the current project
- Goal: Capture *slightly more* info than you think you need!
    - Easier to remove unnecessary data, than add something that isn't there!

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Data

- Only track data that holds its own
  - More detail is not a guarantee for greater accuracy
  - Don't track data for the sake of tracking
- Is Free text needed?
  - Works against consistency
  - Not ideal for reporting/analysis
  - Discuss data needs with team and stakeholders

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People

- Knowledgable planners drive better results
- Hiring decisions are critical to success or failure
  - Communication is improved when people speak more than one expertise language
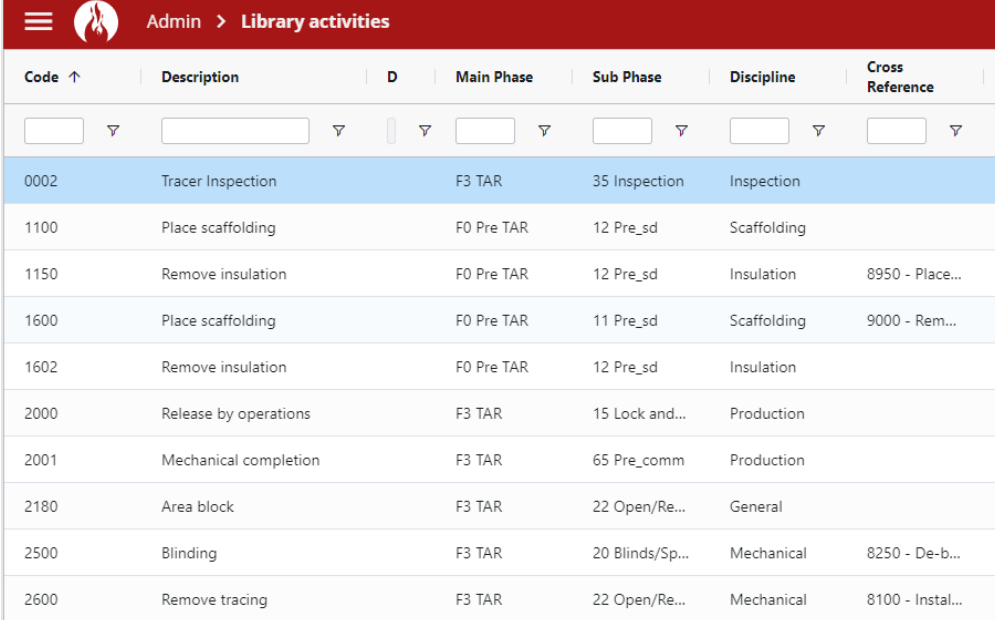 - Add people who intermediate between departments and excel in communication

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Tools

- Reduce the number of tools
- Migrate to a platform that natively integrates
  - "Export/Import" is not integration
- Use tools that are instinctive and easy to use
- Ensure that tools are oriented to drive users towards value added activities

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Templates/Activity Library

- Templates -> Steps for an entire Work Package

- Activity Library -> Individual, repeatable steps that are commonly used

Code ↑	Description	D	Main Phase	Sub Phase	Discipline	Cross Reference
0002	Tracer Inspection		F3 TAR	35 Inspection	Inspection	
1100	Place scaffolding		F0 Pre TAR	12 Pre_sd	Scaffolding	
1150	Remove insulation		F0 Pre TAR	12 Pre_sd	Insulation	8950 - Place...
1600	Place scaffolding		F0 Pre TAR	11 Pre_sd	Scaffolding	9000 - Rem...
1602	Remove insulation		F0 Pre TAR	12 Pre_sd	Insulation	
2000	Release by operations		F3 TAR	15 Lock and...	Production	
2001	Mechanical completion		F3 TAR	65 Pre_comm	Production	
2180	Area block		F3 TAR	22 Open/Re...	General	
2500	Blinding		F3 TAR	20 Blinds/Sp...	Mechanical	8250 - De-b...
2600	Remove tracing		F3 TAR	22 Open/Re...	Mechanical	8100 - Instal...

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Correction Factors

- Account for uncertainty and complexities in activities

- Contractor/Contract

- Norm/Resource Level

"

In essence, your ERP is not a planning tool and Planning tool is not an ERP system.

Invest in integration and get the best of both.

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Best practice

- Close-Out / Lessons learned is <u>not</u> optional, Pay it Forward
- Estimate the time to document and improve <u>as part of</u> the project
- <u>Invest</u> in your templates
- Only track data that is needed

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Benefits

- Validated data
- Right job plans
- Accountibility / Visibility
- Consistent / Repeatable

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Connecting people

- It's the people that make a project
- Software increases accuracy, decreases processing time
- Accuracy improves quality and trust
- Use time reduction on decision making
- Good decision making earns your money back

Software

Process

People

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