Remote Project Support for Owner Teams

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Introduction

Much has been written about the Covid-19 virus pandemic, the impact it has had on the world economy and how it will necessitate changes to the way we have traditionally interacted with other parties. At this time, nobody knows precisely what the future holds, but we do know that many things will change with how we conduct business. Social distancing will become a way of life and face-to-face meetings with large groups of people will be things to avoid.

Businesses have been clobbered, and the road to recovery will be long and tedious. Particularly hard hit are businesses in the energy, fuels, and chemicals markets: exactly the markets that we typically serve. Some businesses will have to delay or cancel projects, some may have to retrench personnel, and some may not survive the economic slump. Project delays and cancellations will inevitably lead to a temporary oversupply of technical and project specialists. If there is no longer a need for, or financial ability to implement projects, these technical and project specialists will be the ones to be retrenched, or who will leave on their own accord to seek challenges elsewhere. When the economy picks up, these specialists will no longer be readily available, and growth projects will either be short-staffed or delayed further whilst suitable technical and project specialists are sourced.

In this article, we reflect on how we, as Owner Team Consultation (OTC), can continue to be of support to organisations and owner project teams with a bouquet of remote project support offerings. We show how we can help you grow business value through successful projects.

‘Old normal’ work methodology

We use the term ‘old normal’ to describe the pre-Covid-19 situation.

Owner Team Consultation (OTC) was formed in 2014, by a group of mostly retired executives and functional specialists from a large petrochemical company, to assist owner organisations and entrepreneurs with megaproject development and execution. Since then, OTC has grown by adding management, technical and project management specialists from other industries. We have also expanded our service

offering to include smaller projects, project and asset audits, and training and development.

OTC has been operating as a virtual business since inception. We have never had central offices, our consultants are located across South Africa, and work from their home offices. Sometimes we have incorporated specialists from Europe and the USA in our assignments and webinars that we have conducted. Our 'old normal' approach has enabled us to keep overheads low, having to only cover IT tools and licenses, as well as administrative and auditing costs. We were thus forced from the start to develop our business processes and tools to enable each person to primarily work from his home base and only cater for specific meetings or client visits.

Since the start of the Covid-19 pandemic, we've had to further enhance our work processes to effectively eliminate all client visits and meetings. We found that we were able to conduct almost all our work remotely with site support from our clients, using the tools and techniques described here.

Remote support tools

Opening remarks

A first obvious requirement when working from home and providing remote support, is to have the appropriate hardware. This means a personal computer, laptop, tablet, or smartphone with which to run applications and access the internet. A modem is required for internet access. As an absolute minimum, the remote worker must be able to send and receive e-mails.

A second requirement is a reliable and reasonably fast internet connection. As any internet connection is prone to failure or disruption, it is generally good practice for each person to be able to access the internet in two independent ways (e.g. landline/fibre connection as well as an alternative cellular connection). A cellular connection via a mobile router, phone or tablet hotspot is generally required, as one would need to connect to the internet from various locations outside of your normal working area.

Access to cloud storage services is also required for remote support. Cloud storage is a service model in which documents, spreadsheets, presentations, tables and pictures, are transmitted and stored on remote storage systems, where it is managed, maintained, backed up and made available to users over a network (typically the internet).

A depiction of what must be in place to effectively provide remote support of projects and clients, is given in Figure 1. The logos displayed in Figure 1 represents the software that we at OTC normally use.

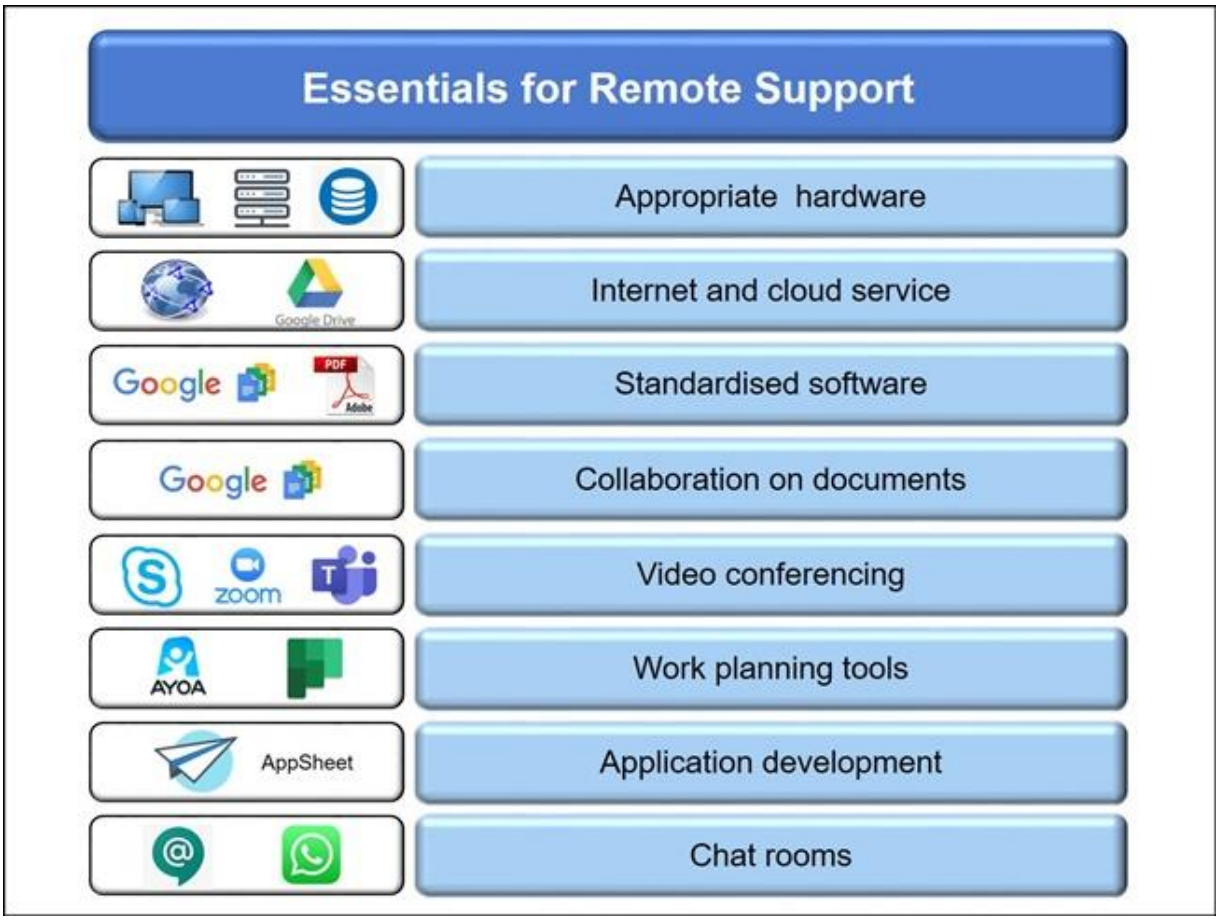


Figure 1: Diagram reflecting essential requirements for remote support

The first two matters listed in Figure 1 have been addressed in this in introductory paragraph. The remaining six topics are covered in more detail below.

Standardised software

At OTC, we standardise on Google Apps as the default option. As such, all our appointments originate from Google Calendar, we use Google Drive with Docs, Slides and Sheets as the primary document storage and collaboration tools. We have found the G Suite of applications to be extremely user-friendly and to be a reliable and robust platform.

However, as a consulting business, we must be familiar with most of the other widely used platforms, including Microsoft OneDrive, SharePoint, Word, Excel, and PowerPoint, as well as other document storage applications like Dropbox, Box and Ansara. Each of our clients has their preferred software systems that we need to be able to interface with. The procedure we follow is to use Google for documents we work with internally and, if possible, we share documents directly with clients for review and comment from within Google Drive. This is not always possible, and we have also worked directly within the client's systems, using Teams, SharePoint, and OneDrive.

We use various specialised applications to help us be more effective in working remotely. For planning and progress meetings, we use tools like Ayoa or Microsoft Planner. Ayoa (previously DropTask) is the first all-in-one mind mapping, chat, and task management application. We also develop job-specific applications using AppSheet as the platform. AppSheet is a development platform for application software, which allows users to create mobile, tablet, and web applications without a working knowledge of computer code. Fortunately, all these tools integrate into the Google platform.

Collaboration on documents

Central to all applications used is the ability for several people to work simultaneously on a document without creating conflicts in the master document and without suddenly getting a message that the document has been corrupted. Such an occurrence can lead to deadlines being missed and much rework from those who were working on the document at the time. It convenient to, from within a document, assign a task to a specific person in the team or ask for suggestions or comments. The tools that we use should be able to enable direct communication and collaboration between team members without having to resort to another application to pass the message on.

It is now possible to ask for input directly from another team member, while working on a specific document (documents, spreadsheets presentations), by adding a comment to the section and assigning the activity to a specific member of the team. This person gets an email message or Google Chat message that he needs to act on. We also make extensive use of change tracking within documents to be able to know who worked on what. We use a strict protocol of firstly creating a document template with all the necessary formatting, then each member inputs the content of the sections he/she is responsible for followed by editing the document and lastly layout and formatting checks. The way comments and actions are assigned is shown in Figure 2.

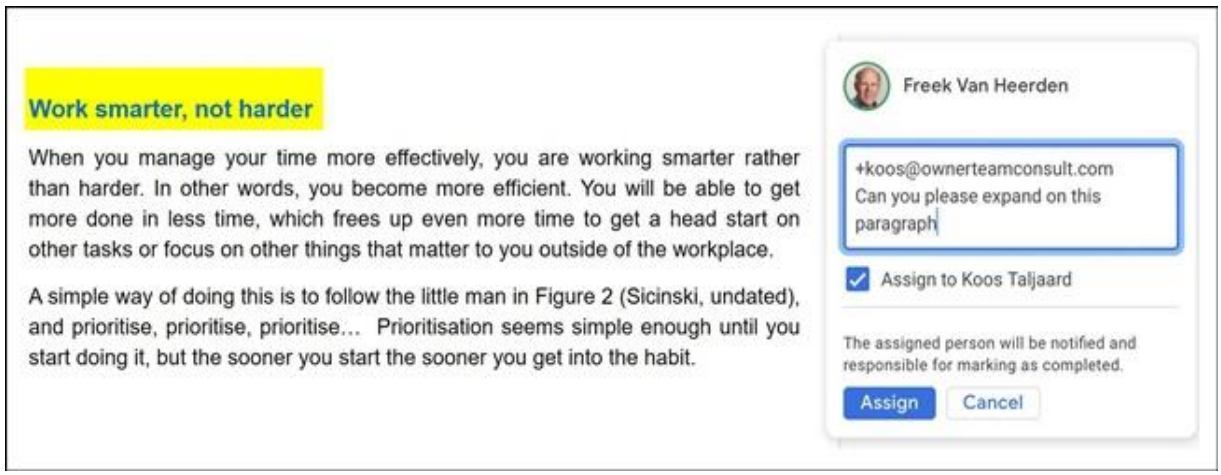


Figure 2: Assigning a comment in Google Docs

We can also track what is happening on a document using Google Chat. Google Chat will report changes to the document or actions assigned to the person. In this way it is easy for the whole team to keep up to date on the progress of documents, spreadsheets and presentations as the main applications used to develop and document the work being done.

Video conferencing

A video conferencing tool with good functionality, stability and security is required for remote work. There are many different conferencing applications available, and the intense competition for supremacy leads to rapid development and continually improved performance and features.

While most of the internet conferencing tools available have the functionality to share audio, video and screen, the more sophisticated applications attempt to replicate what attendees can do in face-to-face meetings. You can raise your hand, nod up and down (thumbs up) to indicate approval, shake your head (thumbs down), virtually "walk" up to the whiteboard or screen to point out what you mean. We attempt to use these added features to enable participants to indicate if they want to speak, agree, disagree. Devices with touch screens are being used more and many of the applications can make use not only of keyboard and mouse input but also from the touchscreen to point out what you mean, draw a circle around a statement. Anybody in the meeting can do this to make a point and not just the person who is sharing his screen.

While the actual video display is useful for initial contact with clients, we mostly use the conferencing tools without video. This has the benefit of improved sound quality and stability in situations of bandwidth restrictions.

Work planning and progressing

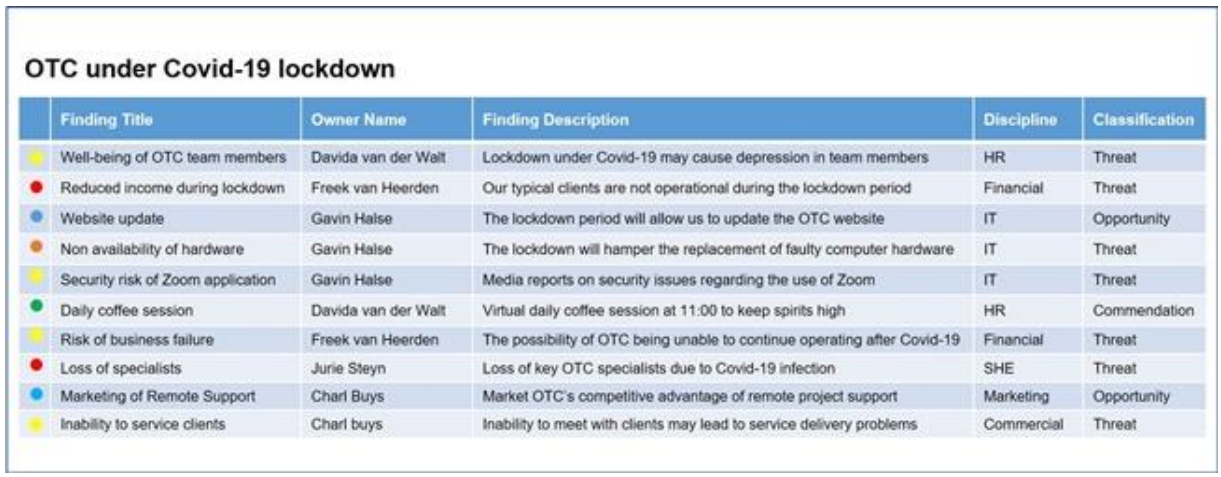
Work must be planned, tasks assigned, and progress measured, whether you work in an office environment, or from home. Sitting around a conference table and using a whiteboard to list work activities and responsibilities is normal practice. The work is then planned by using a tool like Microsoft Project. This situation must be replicated in the virtual environment as best as possible to be effective.

Although Microsoft Project is the de facto planning tool, it is not particularly good when many people need to interact, virtually and in real time, to plan and execute different tasks. For planning a project or assignment, we would still use Microsoft Project to generate an official plan, against which we can track progress. However, we use a tool like Ayoa or Microsoft Planner to develop and list the tasks, assign responsibilities, and record actions. During progress review meetings, the comments and actions are directly entered into Ayoa and this serves as the minutes of the meeting. No more writing minutes after the event. Any team member referred to will get an e-mail notifying him of the actions required. As a task is being progressed, or if a person needs another team member to assist, he can directly request that person's assistance from the tool.

Applications development

We develop in-house applications, or tools, to assist us in the execution of our work which are of great value in remote support circumstances. These tools are mainly based on the AppSheet platform. The intent of these applications are to capture, in real time, the issues being identified by the virtual team. Such a single list of issues helps to keep everybody up to date.

An example of this is when we are carrying out an audit or due diligence. Due diligence teams can be large with business, sales and marketing, operations, maintenance, technical, legal, SHE, and financial experts being involved. As team members encounter activities, issues, threats, and opportunities to be noted or to be followed up, they use the 'issues register' application to register these matters on the central database. This can be done via a computer, phone, or tablet, whatever is the most convenient. As soon as an issue is loaded, it is visible to all team members. Figure 3 is an extract from the summary sheet of an 'issues register'. We have found this to be highly effective and the issues list can be extracted into the final audit report easily. The issues are also prioritised using risk analysis techniques and colour coding.



OTC under Covid-19 lockdown

	Finding Title	Owner Name	Finding Description	Discipline	Classification
	Well-being of OTC team members	Davida van der Walt	Lockdown under Covid-19 may cause depression in team members	HR	Threat
	Reduced income during lockdown	Freek van Heerden	Our typical clients are not operational during the lockdown period	Financial	Threat
	Website update	Gavin Halse	The lockdown period will allow us to update the OTC website	IT	Opportunity
	Non availability of hardware	Gavin Halse	The lockdown will hamper the replacement of faulty computer hardware	IT	Threat
	Security risk of Zoom application	Gavin Halse	Media reports on security issues regarding the use of Zoom	IT	Threat
	Daily coffee session	Davida van der Walt	Virtual daily coffee session at 11:00 to keep spirits high	HR	Commendation
	Risk of business failure	Freek van Heerden	The possibility of OTC being unable to continue operating after Covid-19	Financial	Threat
	Loss of specialists	Jurie Steyn	Loss of key OTC specialists due to Covid-19 infection	SHE	Threat
	Marketing of Remote Support	Charl Buys	Market OTC's competitive advantage of remote project support	Marketing	Opportunity
	Inability to service clients	Charl buys	Inability to meet with clients may lead to service delivery problems	Commercial	Threat

Figure 3: Extract from the summary sheet of an issues register

Chat rooms

There are many chat room applications, although mostly for social interaction. However, these are also several chat rooms for business application, including Slack, Stride, Flock, Chatwork, Troop Messenger, Skype for Business, Microsoft Teams and Google Chat.

At OTC, we normally use Google Chat for project specific communication with the project team members. All members get the message and can respond. Files can also be posted and linked with actions for specific people. An example of a message posted on Google Chat is shown in Figure 4.

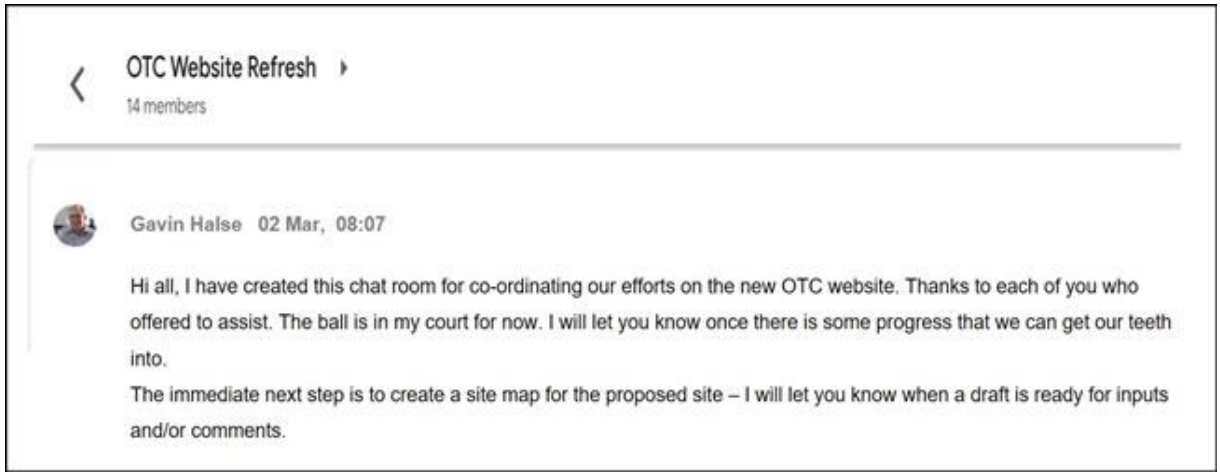


Figure 4: Example of a Google Chat message

The type of work we do and how we do it remotely

Opening remarks

Even though there is a natural inclination to meet face-to-face, it is possible to have effective meetings, workshops, webinars, audits, and training sessions remotely. Some of the activities we conduct remotely are illustrated in Figure 5 and described in the sections that follow.

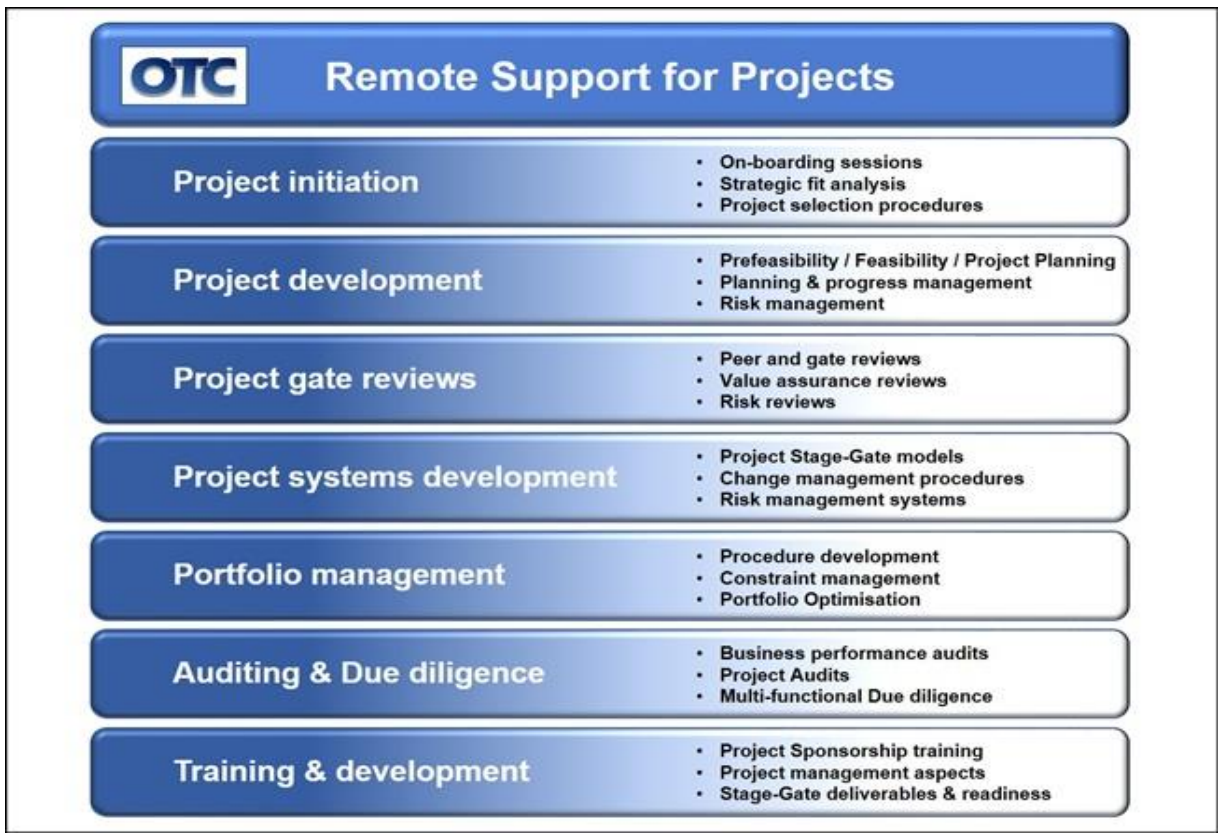


Figure 5: Remote support for projects and owner project teams

For all the activities listed, we use video conferencing, with documents, presentations, and spreadsheets as the basis. Specialised tools are mentioned, where applicable. We use experienced facilitators in workshops to guide the team through the work processes.

Project initiation

During the project initiation phase, OTC can help with the identification of suitable projects to achieve the business' strategic objectives. This can be done by small group discussions, on-boarding sessions, desktop studies, and strategic fit reviews. The timing of specific projects can be determined using project .portfolio management principles.

Essential tools for this phase of a project include video conferencing, cloud-based document management, work planning tools, and collaboration on documents. In some cases, it may prove advantageous to develop applications for specific tasks.

Project development

The project development phase is also called front-end loading, and comprises the prefeasibility, feasibility, and project planning stages. Work that can be performed remotely include framing and alignment, desktop technical studies, planning and progress management sessions, and risk management sessions. In fact, we have completed several prefeasibility and feasibility studies remotely. In the 'old normal' way of life, we used to give final feedback to clients in face-to-face meetings, although this can also be done remotely. Gate reviews can easily be done remotely, but this is discussed in a separate paragraph.

Tools for this phase of a project include Microsoft Planner and Ayoa work planning tools, economic modelling, market assessment tools, risk management tools, and an in-house AppSheet-based scope development tool.

Gate reviews

Most companies use so-called stage-gate models for project implementation. This breaks up a project into logical stages and review gates. The purpose of the review gates is to ensure that a project has reached the appropriate level of readiness before commencing with the next stage. The intent is to ensure that the right amount of work has been done, not too little, nor too much. 'Too little' implies that the project is not ready to proceed, while 'too much means that money may be wasted.

Project gate reviews are done using the Project Development and Rating Index (PDRI) tool and is ideally suited for virtual teams. Other reviews that can be performed remotely include peer reviews, value assurance reviews, and risk reviews

Project systems development

Systems and documentation can be developed remotely for the project management office, or for specific projects. Typical systems for a project management office include stage-gate models, gate review procedures, change management procedures, project portfolio optimisation, project scrubbing procedures, and risk management systems.

For specific projects, we can assist remotely with scope management systems, cost and schedule control systems, and development of operating instructions and training material.

Tools for systems and documentation development include video conferencing, cloud-based document management, work planning tools, and collaboration on documents. We would use the OTC Stage-Gate Model, sponsor toolkit and value assurance model as required.

Portfolio management

According to the Association for Project Management (APM, 2012), project portfolio management is the selection, prioritisation, and control of an organisation's projects and programmes in line with its strategic objectives and capacity to deliver. The overall objective is to optimise return on investment.

OTC can remotely develop procedures for portfolio management and portfolio optimisation, as well as perform project scrubbing and portfolio optimisation. Project scrubbing involves reviewing and adjusting key assumptions, exchange rates and performance assessments to be able to directly compare projects to one another. Basic video conferencing and collaboration tools are required.

Auditing and due diligence

Project and business auditing can be performed remotely, provided the required documentation is available, and one has access to knowledgeable individuals at the business to answer questions and fill in gaps in the documented information. We can perform business performance audits, various project audits (setup, execution planning, and commercial close out).

Multi-functional due diligence audits for mergers and acquisitions can mostly also be performed at distance, although, when it comes to mechanical integrity and maintenance standards, it is always essential to do site inspections and evaluations as well. However, even that can be accomplished by camera if a site visit is not possible.

AppSheet-based 'issues registers' have proven invaluable for audits in the past. Other tools in our arsenal include:

- Team Effectiveness assessments;

- Project Health Indicators;
- Project Control assessments; and
- Project Risk Control Reviews.

Training

Development of training materials and courses can be done remotely. If required, these can be converted to web-based training modules, where students can progress at their own pace. Assistance is always just and e-mail away.

Recent developments include training courses on project stewardship, scope management, value assurance, framing and alignment, project controls, and gate deliverable readiness.

Concluding remarks

OTC has been operating as a virtual business for more than 6 years and has all the necessary tools and systems to support such an operation. We have found this a highly effective way of conducting and managing our work and propose this virtual team concept as a cost-effective way to execute many of our contracts or assignments. As such, we can very quickly kick-off the work using our proven 'remote' methodologies and tools, rather than having to wait for opportunities to meet face-to-face.

Virtual teams maximise the use of limited resources. You can engage, mobilise, ramp up very quickly and maintain a steady pace of production. Having access to a wide net of experience allows us to look beyond the resources immediately available to us. In cases where the competencies and skills needed require engaging people from outside the organisation, we have found that setting up a virtual team and contracting the additional resources can be done very quickly and effectively.

It is unlikely that the 'new normal' (post Covid-19) for OTC will be vastly different from the 'old normal'. Of course, there will be differences: there will be less travelling, fewer face-to-face meetings, the wearing of face masks in public, and much less shaking of hands. However, we have already proven the effectiveness of our 'virtual' operations' tools and methodologies as far as performing technical and project support work at distance is concerned.

We are ready to provide the same level of support to our clients as before, albeit remotely.

References

APM (Association for Project Management), (2012) *Association for Project Management Body of Knowledge (APM-BOK) 6th edition.* Butler & Tanner, Frome, Somerset.