

# COGENCE Alliance

Owners + Architects + Engineers + Contractors

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# Today's Roundtable: Communicate for Project Success!

**Selected Session Slides & MentiMeter Results**

# SW Ohio Cogence Roundtable: 1 February 2024



## Introduction of Panelist:

**Tommie Jo Brode**  
President, Venice  
Solutions Group



### About Our Expert

**Tommie Jo Brode** received her Bachelor of Arts from Youngstown State University in Youngstown, Ohio. Her undergraduate focus was Political Science and Mathematics. She received her Juris Doctorate from Capital University in Columbus, Ohio. Tommie Jo is licensed to practice law in Ohio but has served employers in many locations throughout the Eastern United States. Her professional experience includes practicing employment law, multi-state toxic tort litigation, managing workers' compensation programs, risk management, diversity and inclusion, elected office, collective bargaining, EEOC, ADA, FMLA, and occupational health and disability. Her experience includes working in house for a global manufacturer overseeing their programs as well as being the Director of Risk for the Ohio Turnpike.

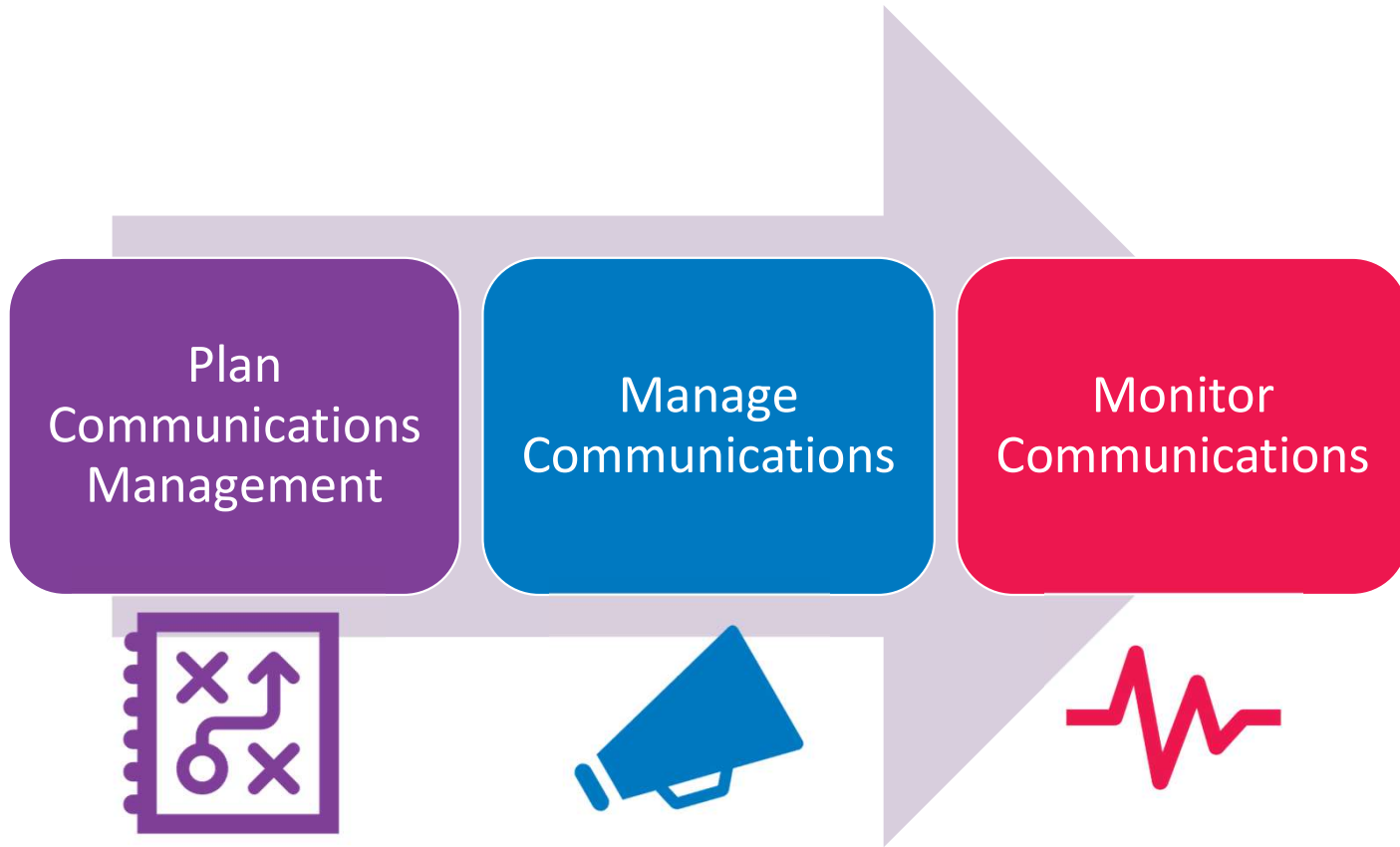


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# PMI's PMBOK: Project Communications Mgmt.

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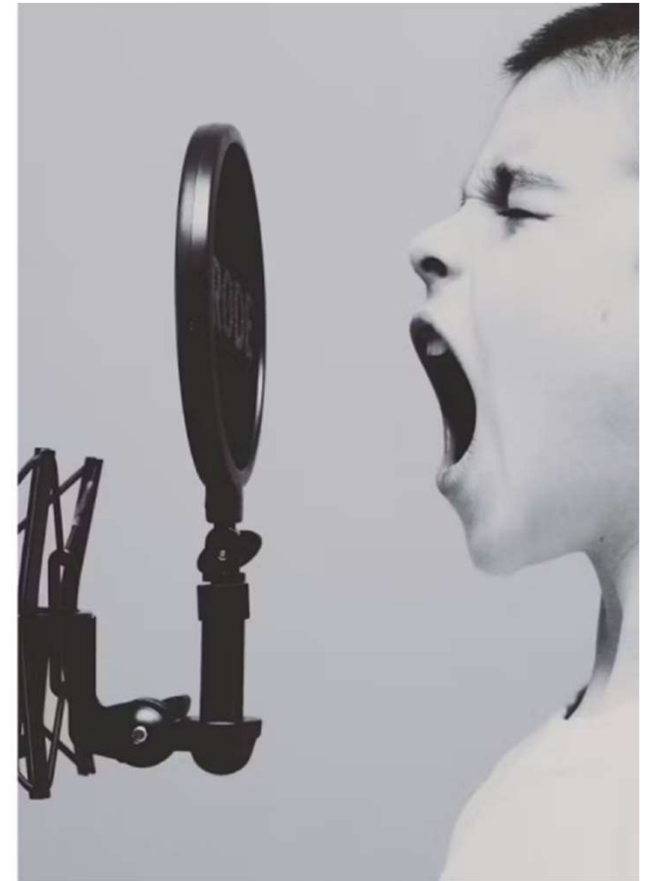
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# November Roundtable Survey Results

If Enhanced Project Communication is a theme for upcoming Roundtable, what would be areas of focus?

42 responses



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## What is the Difference?

### Policy

- Formal written directive to employees
- Could be in employee handbook/manual
- Could be in an email
- Could be posted on bulletin board
- This is what SHOULD happen according to the employer/supervisor

### Practice

- This is what actually happens at the employer
- Policy and practice may be the same, similar, or very different
- It is the way things occur in actual practice
- If we asked employees – what would they say?

## Communication at Work

- Email
- Letter
- Instant message
- Memo
- Mission/Strategy Statement
- Post-it Note
- Telephone
- Zoom or Teams
- Conversation





# Communication at Work

## All of these:

- Email
- Letter
- Instant message
- Memo
- Mission/Strategy Statement
- Post-it Note
- Telephone
- Zoom or Teams
- Conversation

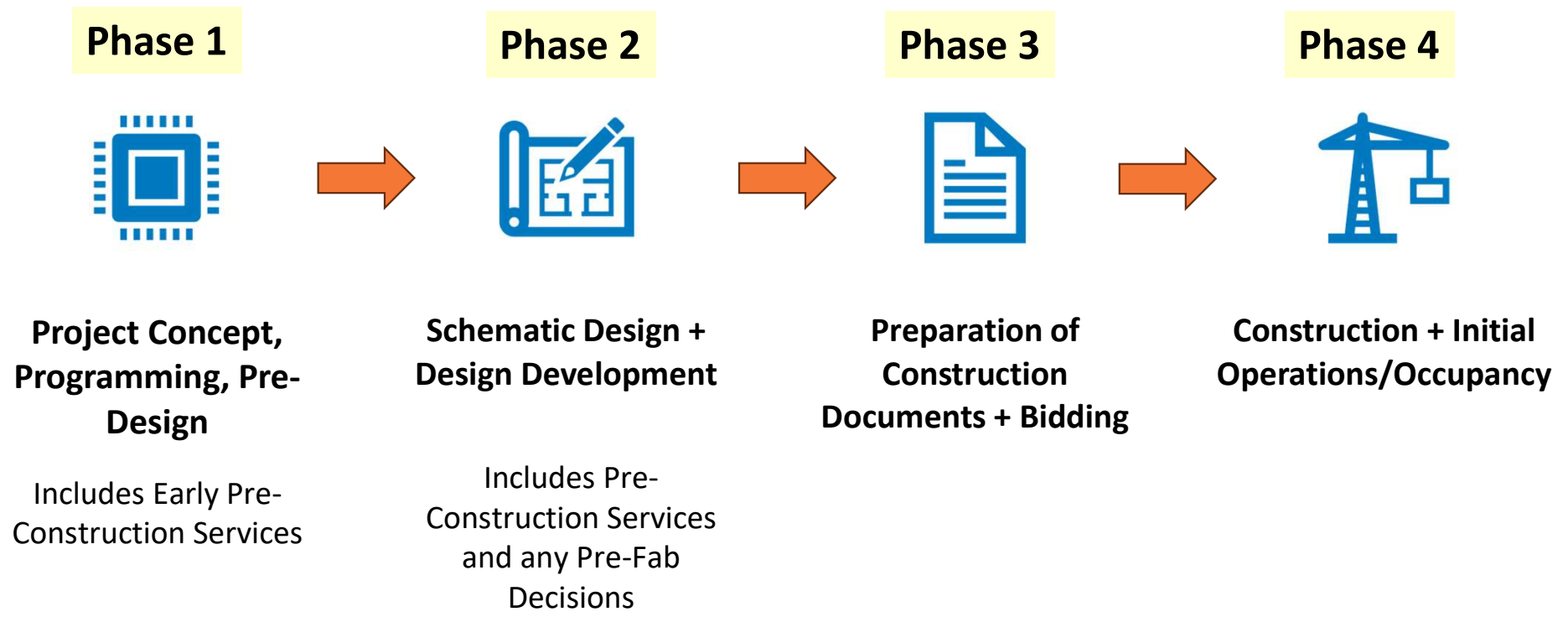
## And also these:

- Body language
- Facial expression
- Tone
- Glance
- Silence
- Laughter/Tears
- Appearance





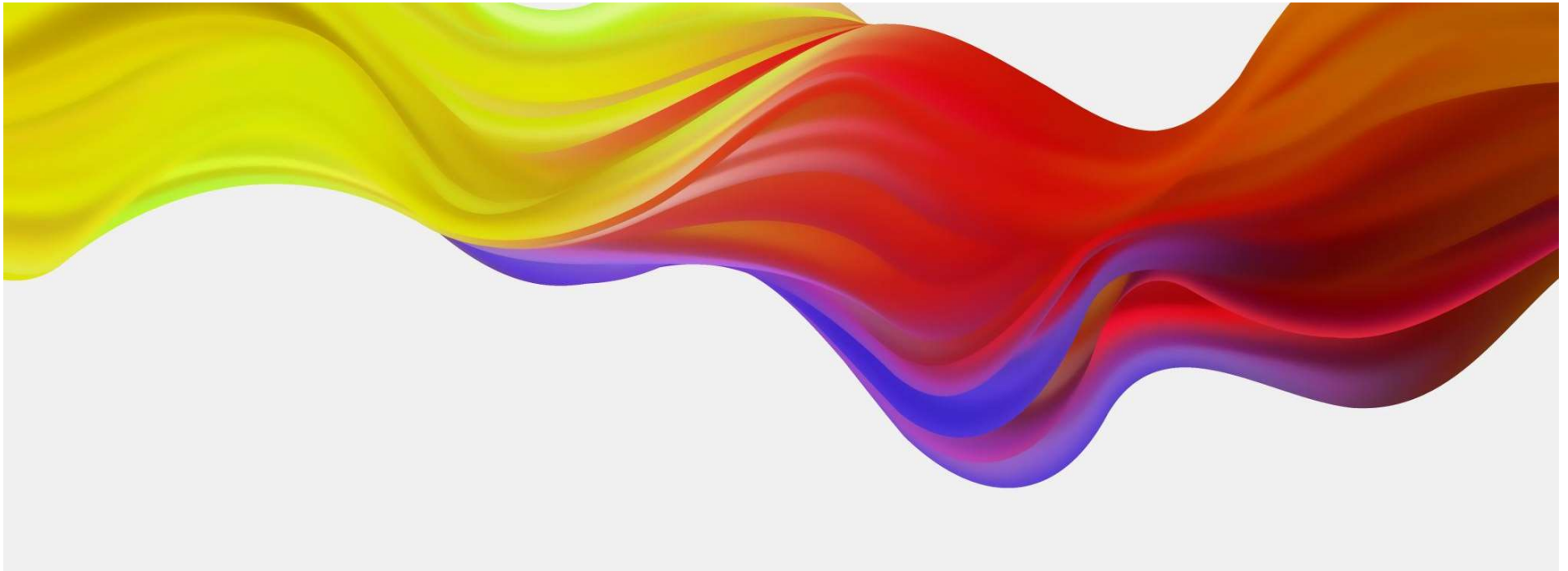
# Project Life-Cycle for Today's Discussion





# Survey Session #1: Communication Challenges

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**Let's Go to MentiMeter!**

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# MentiMeter Survey: Phase 1 Communication Challenges

For Phase 1 (Programming, Project Concept, Pre-Design), what do you see as the main communication problems or barriers in this phase?

45 responses



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# MentiMeter Survey: Phase 2 Communication Challenges

For Phase 2 (Schematic Design + Design Development), what do you see as the main communication problems and barriers in this phase?

52 responses

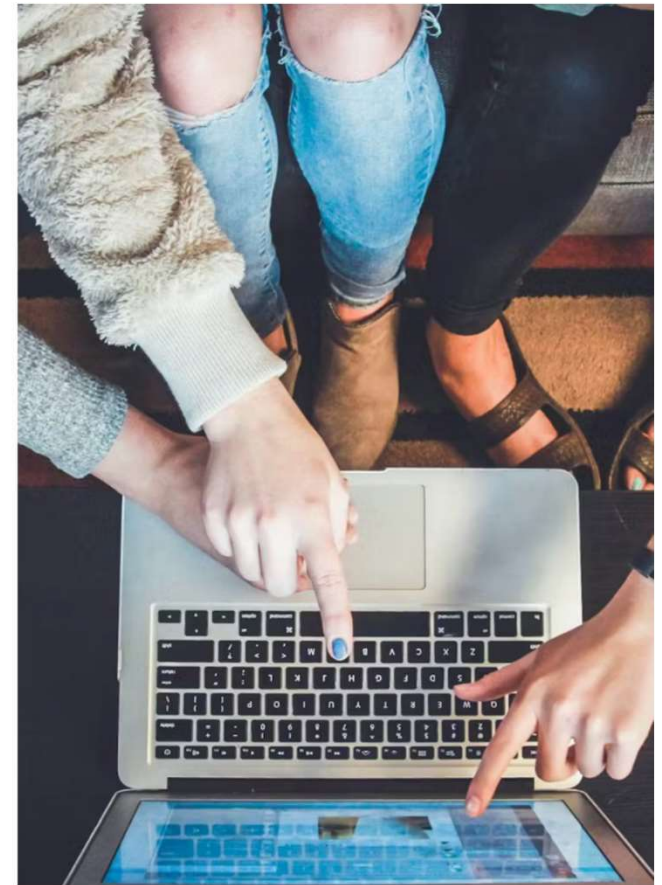


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# MentiMeter Survey: Phase 3 Communication Challenges

For Phase 3 (Construction Documents + Bidding), what do you see as the main communication problems and barriers in this phase?  
57 responses



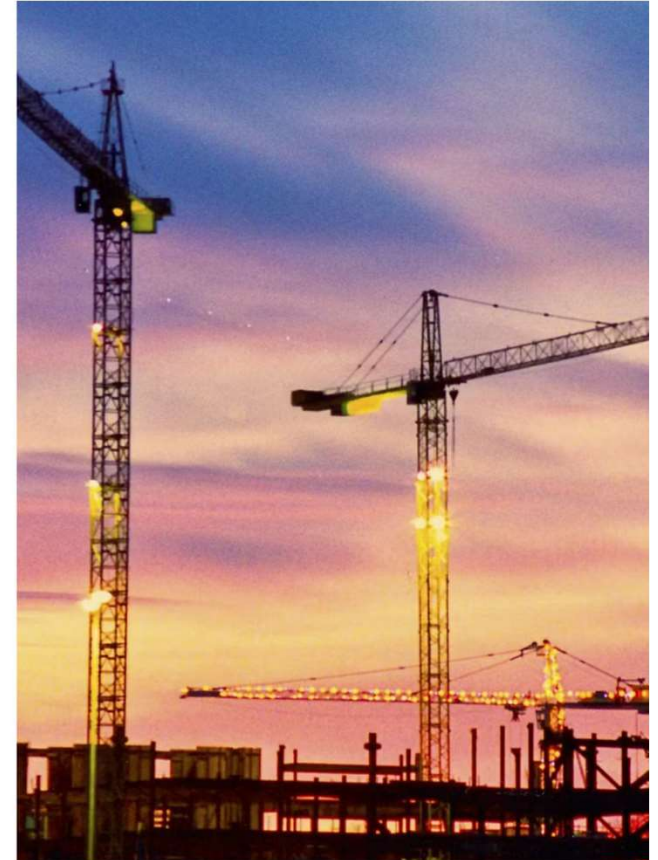
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# Mentimeter Survey: Phase 4 Communication Challenges

For Phase 4 (Construction + Initial Operations/Occupancy), what do you see as the main communication problems and barriers in this phase?

62 responses



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# Breakout Discussion (For Each Life-Cycle Phase)

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## Project Life-Cycle Phases:

1. Project Concept, Programming, Pre-Design
2. Schematic Design + Design Development
3. Preparation of Construction Documents + Bidding
4. Construction + Initial Operations/Occupancy



**Best Practices for Breaking Down Communication Barriers & Establishing Trust**



**Best Communication Techniques to Promote Collaboration**



**Important Communication Skills Needed**



# Breakout Group 1 (Phase 1): Synopsis

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## Establish good forums for communication

Have a kick-off workshop  
Set up early recurring meetings to build momentum



## Develop/use Pre-Construction strategy to align expectations to reality



## Drive helpful behaviors among stakeholders:

Courage to speak the truth  
Forthrightness  
Seek first to understand



## Write a Project Charter



## Use of Responsibility Assignment Matrices:

RAPID-type Chart:  
Identify the decisions to be made, who makes them, the information needed to make them, and who owns the risk by not doing so



## Signs that this is working

Vulnerability  
Measure it



## Ensure all key stakeholders are involved

Recognize some stakeholders enter the project later than Phase 1





# Breakout Group 2 (Phase 2): Synopsis

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## Create more effective meetings:

Conduct In-person meetings when possible

Be present in on-line meetings – turn on camera

Look to streamline Agenda – seek to clear Action Items

Come to each meeting prepared



## Align ALL design team members with Owner

Use open communication with ALL Design Team and Owner



## Team Leaders need to promote consistency in communication



## Seek to promote Partnerships



## Use Collaborative Technology

Such as BIM360, Bluebeam Studio



## Avoid CYA postures

This kills collaboration

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# Breakout Group 3 (Phase 3): Synopsis

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## Carefully select Project Delivery Method

More collaborative: IPD and DB  
Less collaborative: DBB, Hard Bid



## Use of Pre-Award and Post-Award Meetings

Always follow up with new information



## Always be accountable

Always do what you say you will do



## Effective Communication Techniques:

Lots of follow-up, questions, clarity of assumptions

Choice of message medium:  
Visuals/documents vs.  
conversations, or narrative only

Use MS-Teams to your advantage –  
virtual and in-person



## Important Skills Needed:

Being able to articulate intent with  
drawing/sketch or other visual

Clarity of document revisions

Ability to clearly re-cap discussion  
and state high-level objectives

Ownership



# Breakout Group 4 (Phase 4): Synopsis

Best Practices for Breaking Down Barriers & Building Trust	Communication Techniques to Promote Collaboration	Important Communication Skills Needed
<ul style="list-style-type: none"><li>• Have a Team Building Event/Partner Session</li><li>• Effective Onboarding</li><li>• Update Communication Plan for Construction Phase</li><li>• Seek to Centralize Current Information</li><li>• Use of Lean Construction Practices<ul style="list-style-type: none"><li>• Last Planner</li><li>• “Plan of the Day” Meeting</li><li>• “Putting Project First”</li></ul></li><li>• Provide Solutions/ Opportunities – not just Communicate Problem<ul style="list-style-type: none"><li>• Checking Ego</li><li>• Putting project 1st</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Meet in person as a priority</li><li>• Planning of meetings<ul style="list-style-type: none"><li>• Establish consistent cadence that involves everyone</li></ul></li><li>• Use of Plus/Delta</li><li>• Use of Active Listening</li><li>• Opinions heard, addressed as necessary</li><li>• Open to constructive comments</li><li>• Remember it is an environment of “Command &amp; Control”<ul style="list-style-type: none"><li>• Demand accountability</li></ul></li><li>• Celebrate/praise when things are done well</li></ul>	<ul style="list-style-type: none"><li>• Listening Skills</li><li>• Being clear and concise</li><li>• Talk Face to Face</li><li>• Know when to be flexible, when to be firm</li><li>• Apply restraint when signals/ messages are “Bad News”:<ul style="list-style-type: none"><li>• Resist immediate emotional response/reply</li></ul></li><li>• Avoid “Youth Lingo”</li></ul>

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# “Go To” Interpersonal or Communication Skill

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Lean Construction

Talk in person!!!

Collaboration

Availability

Seek to understand

Team building and  
establishing protocols

Get to know the personalities

Regular project meetings

Whiteboard sketch

Meet someone where they're  
at.

Clear is kind

Central place for  
communication

Build rapport through team  
building, getting to know the  
team members and their  
personalities

Authenticity, Humor,  
creativity

Turn my camera on.

Coaching and mentoring

In person discussions  
followed up with written  
summary

Comedic approach

Bring food or homemade ice  
cream

Engage all stakeholders in  
productive planning.

Ask questions

Talk to the person directly.

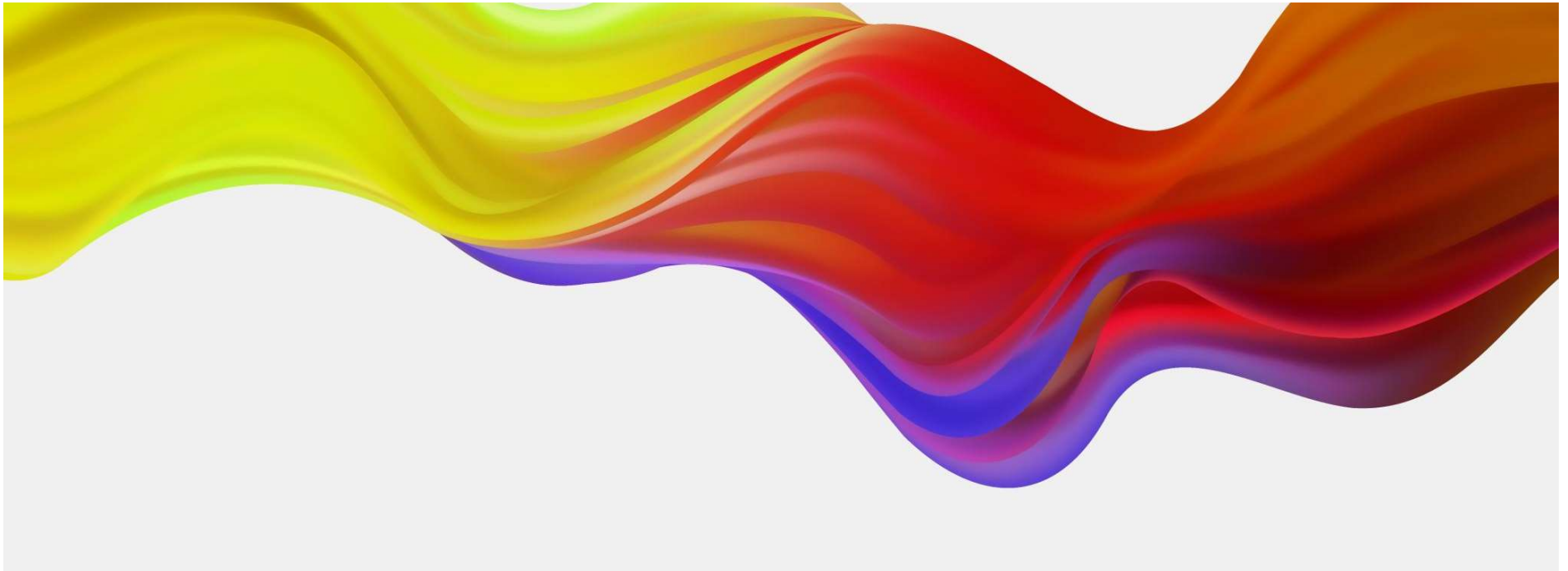
Ensure meeting minutes are  
thoroughly recorded and  
using a specific file sharing  
service for that project.

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## Survey Session #2: Plus/Delta

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**Let's Go to MentiMeter!**

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# What Did You Like About Today's Session?

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Good topic. Topic was very relevant.

Great content

Engaging conversation, good conversations

Insight

Great to collaborate and talk about better ways to communicate with our partners in construction.

Breakout sessions provided ability to discuss with smaller group.

Important topic that is same for all stakeholders

Engagement

Granular examples keep the conversation relevant.

Meeting new people

Good discussion with varying perspectives.

Meeting some great people

Broad experience among attendees

Good perspective on how others in the process view the same communications challenges.

More insights from the expert(s)

Jerry's facilitation

Diversity of attendees and perspectives.

Structure of activities

Quality of participation.

Open, candid conversations.

Common themes in responses to break out conversations

Interaction and learning about others

Case study examples to leverage for discussion

More provocative topic, got us out of our norm.

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# What Did You Not Like About Today's Session?

- More Trades in Session
- More Diversity in Session
- Improve traffic on I-75
- More project owners in Session
- Diving deeper into a topic
- No Graeter's ice cream
- Start on time
- More attendees



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**Today's Roundtable:**  
**Communicate for Project  
Success!**  
**Supplemental Slides**

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# Psychologically Safe Work Teams



Closer look at psychologically safe teams:

- ▶ How people present themselves at work:
  - ▶ Team members feel comfortable to be themselves and actively learn on the job with their colleagues
- ▶ What team members say about their team members:
  - ▶ Team members express mutual respect, trust and interest in each other. Team members do not attack each other's knowledge, competence, motivation, personality or character.
- ▶ What team members say about their team's norms and culture
  - ▶ Teams are experienced as interpersonally riskless and liberating particularly with regards to collective, shared learning and collaboration.

Source: [https://medium.com/@Harri\\_Kaloudis/psychological-safety-at-work-what-do-psychologically-safe-work-teams-look-like-5585ab0f2df4](https://medium.com/@Harri_Kaloudis/psychological-safety-at-work-what-do-psychologically-safe-work-teams-look-like-5585ab0f2df4)

## WHAT'S THE DIFF? Trust and Psychological Safety

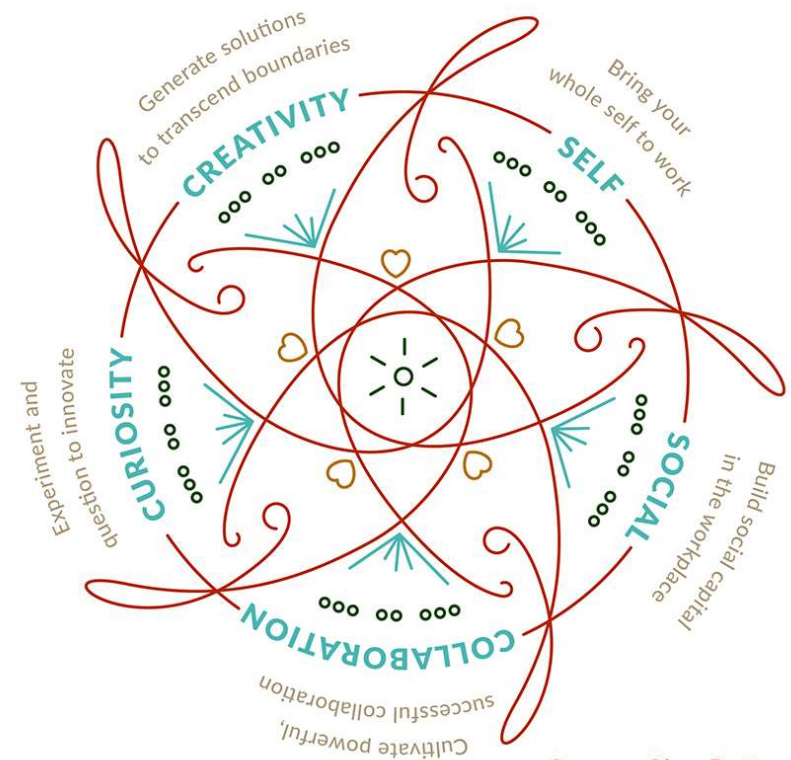
Psychological safety is the belief that your environment is safe for interpersonal risk-taking. It's similar, but slightly different from, trust.

TRUST	PSYCHOLOGICAL SAFETY
Will <b>YOU</b> give others the benefit of the doubt when you take a risk?	Will <b>OTHERS</b> give you the benefit of the doubt when you take a risk?
	
<i>"Bob is probably going to freak out if I disagree with him."</i>	<i>"My team expects me to speak up. It's how we do things."</i>



# How To Build Psychological Safety

1. Approach conflict as a collaborator, not an adversary
2. Speak human to human
3. Anticipate reactions and plan countermoves
  - ▶ Skillfully confront difficult conversations head-on by preparing for likely reactions.
4. Replace blame with curiosity
  - ▶ State the problematic behavior or outcome as an observation, and use factual, neutral language
  - ▶ Engage troubled team member in exploration
  - ▶ Ask for solutions
5. Ask for feedback on delivery of messages
6. Measure psychological safety (survey team members)



Source: Gina Battye

Source: *High-Performing Teams Need Psychological Safety. Here's How to Create It*, Laura Delizonna, PhD, Harvard Business Review, 24 August 2017



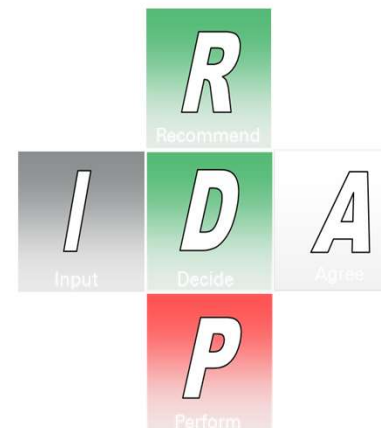
# Responsibility Assignment Matrix: RAPID Chart (Key Decisions)

Decision is required to determine whether a cracked vessel nozzle should be replaced during a turnaround.

<b>R</b>	<b>Recommend:</b>	Maintenance Superintendent
<b>A</b>	<b>Agree:</b>	Engineering Authority
<b>P</b>	<b>Perform:</b>	TAR Manager
<b>I</b>	<b>Input:</b>	Inspector / Metallurgist / Operators
<b>D</b>	<b>Decide:</b>	Operations Manager

## Key Concepts:

- RAPID charts were originally developed by Bain & Company, a renowned management consultant.
- Designed to deal with key decisions, not tasks or activities
- When the roles involved in decisions are clearly delineated, teams and organizations make the right choices—swiftly and effectively.
- Good practice is to use a set of RACI and RAPID charts to define and communicate who does what.
- A RAPID chart would contain two dimensions - one for the project personnel and the other for the decisions to be made.



**Recommend** – a decision or action.

**Agree** – Formally agree a recommendation. Must be consulted, should not be ignored.

**Perform** – Be accountable for performing a decision once made.

**Input** – Provide input to a recommendation. Must be consulted, may not be ignored.

**Decide** – Make the final decision and commit the organisation to action.





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# **Today's Roundtable:** **Communicate for Project Success!**

**Other Slides Presented in Session**

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## Mission + Purpose

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### **Cogence** *(Latin)*

**“To drive together” or “Thinking that is well organized”**

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The purpose of the Alliance is to bring Owners and Developers, Architects and Engineers, Construction Managers and Contractors, and Allied Industry Professionals together to **advocate** and be a **resource** for improved project delivery.

For more information visit us at [www.cogence.org](http://www.cogence.org)

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***The Cogence Alliance Southwest Ohio Chapter is pleased to announce its inaugural 2024 Board of Directors:***

- ***President: Alex Jonovski, Demain***
- ***Vice President: Nick Rittinger, HAWA Engineers***
- ***Secretary: Krutarth Jain, Champlin Architecture***
- ***Treasurer: Kevin Thompson, Cogence Alliance (non-voting)***
- ***Program Chair: Jerry Klanac, University of Dayton/PMA Consultants***
- ***Partnership Chair: Steve Lawson, Shook Construction Co.***
- ***At-Large: Joe Ferdelman, Heapy Engineering***

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## ***General Announcements:***

- ***Volunteers needed to help with Program and Partnership Committees.***
  - ***Please let Kevin Thompson or a board member know if you are interested.***
- ***If you are not a Cogence Partner, and you want to support our mission, we hope you will join us for 2024!***



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# Overcoming Headwinds in Uncertain Times Together: November Roundtable revisited: Focus on Cost

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# November 2023 Roundtable: Selected Key Points

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## Managing the Golden Triangle of Project Goals

Define the rank order between cost, schedule & quality as it relates to scope of the project. Drive alignment among all stakeholders

Develop trust and communicate effectively



## Cost Contingency: Best Practices

Consider risk analyses when establishing cost contingency

Define what the cost contingency should be used for



## Getting a Reliable Project Cost Estimate

Set up estimator for success

Make sure base practices are modified for project specifics

Declare underlying assumptions and clarifications



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**Save The Date!**

**September 12-13, 2024**

**Cogence Town Hall**

**Hilton Easton Town Center, Columbus**

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