Shutdown Communications

By Joel Levitt

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Shutdowns are big events. As in all big events the stakes are high and there is significant anxiety from people at all levels in the organization. In addition to anxiety there is a significant amount of specific information held by one person that is needed by another. The key to successful shutdowns is constant communications.

If no one reads your E-mail can you say communication took place?

Communications is a two-person process. It is not enough to send out a fifteen page E- mail and expect that communication has occurred. Communication requires a transmitter and a receiver (or a transmission and a reception). If the recipient doesn't read the E-mail then no communication takes place. There is a responsibility on the part of the shutdown management team to use techniques to ensure that communication takes place and that people read their E-mail relating to the shutdown, and think about it.

To encourage communications we create an atmosphere where people can freely reveal problems. If people are concerned about consequences and sanctions when they report problems, the atmosphere will not be conducive to solving the problems. Everyone has heard the stories about the king who killed the messenger who brought bad news. In shutdown teams, messengers who bring bad news need to be praised and lauded and not killed! Only when it is on the table can bad news be managed.

John Larson a ChevronTexaco Project manager working on a project-driven (as opposed to a maintenance-driven) shutdown offshore in the gulf of Thailand, has one rule. His rule is “no surprises.” He is scrupulous about making sure his boss and the customer know any bad news that he is aware of and he requires that his team keep him appraised of any adverse situations. This requirement doesn’t mean that he gives up the ability to solve problems. On the contrary, he might give his boss bad news with an action plan to mitigate or avoid the problem.

Basic skill: Meetings

The dictionary says that the definition of meeting is to come face-to-face **or** to come together for a common purpose. In shutdowns the face-to-face part is less important than the common purpose. Some key people can use technology to avoid being face-to-face but to attend a meeting by phone, videoconference or over the Internet.

Ormen says, “Project status meetings are both communication and control devices. This is the forum where people keep up on what others are doing; where you build the cornerstones of your project culture and set the tone for your people (from the Digital Norseman’s, PM web site).

Every shutdown is managed by a series of meetings. Even with all the improvements in technology, meetings are still the key communication tools for shutdowns. Improving your organization’s meetings is a high return on investment activity. A small improvement in meeting efficiency could be the single most important thing you can do to improve your shutdowns!

Shutdown meetings loom large at the beginning of the process and are designed to get people up to speed, solicit input, and make sure nothing is forgotten. As the shutdown progresses the meetings get smaller and are more focused on particular issues.

How many of you had a class in how to run meetings? Is there even a course in this important skill? This essential skill should be taught on day one in any school that wants to train people for business.

In general it is better to have two short meetings per week rather than one long one. Even long shutdowns need frequent updates and communications. Shorter shutdowns will have daily shutdown meetings. Usually meetings start with a high energy and with intention (to solve a problem, communicate a plan, etc.). After an hour people lose their focus and their intention starts to erode unless the meeting is managed very closely. Sometimes a quick 15-minute stand-up meeting is all that is needed.

The key to keeping projects on track is to detect problems early enough in the process that an intervention can be made before it is too late! It is no good finding out at a weekly meeting that an eight-day shutdown is only half complete.

"Small problems are difficult to see but easy to fix. However, when you let these problems develop, they are easy to see but very difficult to fix." Macchiavelli, *Principe* (1530)

As we'll explore in the project management section, one of the biggest issues of shutdowns is choosing meaningful activities. If your activities are well chosen, then progress tracking is not difficult. Consider creating a watch list of deliverables to be reviewed at the daily shutdown meeting of all activities due within the week on or near the critical path. Make sure you keep getting feedback on the status of these activities in addition to your regular agenda items.

Meetings are important but it also won't hurt to get out on the jobsite daily and see for yourself what is the status of these critical and near critical activities.

Of course, if you go out into the field you'll hear about small problems that won't make it to the meetings. In person this process is quite messy, but as they say in the army "no battle plan ever survived contact with the enemy."

In addition to meetings with the project team you need to keep the stakeholders and your boss updated by means of less frequent meetings (monthly) with a broader overview of the project. In complex or longer shutdowns (installation of a cogeneration facility, for example), these meetings serve to re-engage the stakeholders and the bosses in the project (especially during the dark days).

The following are the most important areas of meeting management: (you might focus on one at a time until you feel you've gained some mastery in that area).

Agenda: The agenda is the road map for the meeting. Without it the meeting will meander (but you might not notice it since there is no agenda).

Attendees: Who is in the room is almost as important as what is discussed. Be ruthless about who you invite.

Notice: The best way to get the right people to attend is to make sure they know about the meeting. Be rigorous.

Practices: These are things to do to make your meetings work. As with all skills you have to repeat these practices before they will feel natural (psychologists say repeat the new behavior up to 21 times to feel natural).

Accountability: Holding people accountable for what they promise or what you've requested is important to the smooth functioning of the whole shutdown. People tend to avoid accountability. Once they get a taste of accountability without blame they will realize that their growth and development is linked to the accountability that they take on.

Topic	**The 'good meetings' check sheet**
Agenda	☐ Have agendas passed out in advance and in a form that is understood by everyone. How do you know if everyone understands it? Try asking privately.
Attendees	☐ Decide who should be invited and determine if a particular person is needed, or if a representative from that area is needed (and communicate that fact). The person's own good time management techniques may have someone tied up for your meeting time so if you can do with another representative, that's great.
Attendees	☐ For scheduled meetings, periodically review the invitee list and see if everyone should still be invited. Talk to anyone you are dropping. Add people as the shutdown

	reaches a stage where their skills are needed, and drop people whose skills or contributions are no longer required. You can ask.
Agenda	☐ Consider putting the most important agenda items second and third on the agenda (not first, to accommodate late-comers).
Agenda	☐ Consider putting times on agenda items. (Discuss problems and decide on a course of action such as “contractor ABC 15 minutes…”) Some leaders only put the time on their agenda to guide them. Others use time publicly to help discipline the whole group’s discussion process.
Agenda	☐ Tailor the number of agenda items to the type and length of the meeting.
Agenda	☐ Consider reviewing the agenda with your boss ahead of the meeting. This would be particularly useful if there are any sensitive or controversial agenda items. Remember the commandment “Thou shall not surprise your boss on sensitive issues”
Notice	☐ Give as much notice as possible for ad hoc meetings (as opposed to regularly scheduled meetings).
Notice	☐ Publish and publicize the start and end times clearly. If someone is late it should never be because they were not informed of the time. By the same token, when a meeting time has been changed, send the change out and request a reply acknowledging the change. Call or page people who do not respond.
Practice	☐ Start and end on time and expect people to attend on time. If they are late expect an apology but not a reason or excuse. If a person is late (especially without communicating with the leader) they have just wasted everyone’s time. It doesn’t really matter why.
Attendees	☐ Know who will not attend. Have people know they should contact you when they can’t make the meeting. Everyone’s time is important, if you know that someone cannot make the meeting you’ll know that you don’t have to wait for him or her.
Attendees	☐ In regular meetings where the same people attend put out nametags (called tent cards), which will remind people of everyone’s name. The nametag at the table (without a person) also shows who is missing.
Practice	☐ Ask everyone to set his or her pagers and phones to

	vibrate (or if they can risk it, to turn them off). Calls should be taken outside the room unless the content directly impacts a discussion or decision.
Practice	☐ As the leader, be the first speaker and quickly sum up the status of the shutdown then provide a short overview of the agenda of the meeting.
Practice	☐ Report on deliverables and progress (or ask for reports from the people who are responsible for each area). If appropriate, reprint the Gantt chart showing progress areas and problem areas
Accountability	☐ Assign tasks and responsibilities, being sure to include in the minutes **who** is to carry **what** out by **when**. Of course **how** and **why** are useful but not essential.
Accountability	☐ Follow up on tasks and responsibilities assigned at the previous meeting.
Accountability	☐ Insist that meeting goers do their homework
Practice	☐ Take straw polls on controversial issues ahead of time
Practice	☐ Review important presentations ahead of time – do not be surprised.
Practice	☐ Have someone take minutes (be sure to select someone who is good at it).
Practice	☐ Publish brief minutes that include promises made, deadlines, and follow-ups. Have a simple system to manage promises and requests. Copies of the minutes get filed into the shutdown narrative report.
Practice	☐ It is important that when decisions are made they are formally written into the minutes and all attendees agree to support them even if they did not agree with them during the discussion.
Practice	☐ Bring issues forward from one meeting to the next until they are resolved. If any item is important, make sure it is resolved. As mentioned it is important to have a full discussion where all views are aired. When a decision is made the team should stand behind it (even if individuals don't agree).
Practice	☐ Meeting length is proportional to the comfort of the room (no chairs means a short meeting) and to the level of refreshments (add food - add an hour)
Practice	☐ Chose an appropriate place for the meeting and manage temperature, sound level, light level, and distractions if

	possible.
Practice	☐ Encourage the practice of looking for failures in your system rather than looking for people to blame.
Practice	☐ Create an environment where people reveal what is going wrong first when they speak and what they plan to do about it. They can also ask for help.
Practice	☐ Have a practice of honest acknowledgement for accomplishments

In *Turnaround Management* Tom Lenahan lists some of the meetings necessary for getting set up for a shutdown as follows: (other meetings may be needed to actually run the shutdown after it commences).

1. Policy Team Meeting
2. General Work list Meeting
3. Major Task Review Meeting
4. Project Review Meeting
5. Inspection Review Meeting
6. Spares Review Meeting
7. Plant Shutdown and Start-up meeting
8. Safety Meeting
9. Quality Meeting
10. Site Logistics Meeting

To make them most effective these meetings have some additional guidelines:

- ☐ The agenda is restricted to one item (a topic based on the title of the meeting)
- ☐ Only those who are directly involved are invited
- ☐ Clearly define the block of work or time limit and do not exceed it
- ☐ The chairperson should be the most appropriate member of the Preparation team (the logistics meeting, for example, might be chaired by the logistics manager)
- ☐ Minutes are prepared following the advice above for general meetings and copies are sent to the shutdown manager. Copies are also included in the shutdown narrative.