

The contents of this document are notes captured by facilitators at the GBA's annual Business Roundtable Event held during the Fall 2016 Conference. The Business Roundtables are opportunities for members to brainstorm, share ideas, and collaborate on important business topics impacting the geoprofessions. The information presented below consists of discussion summaries from the attendees captured by the table moderators at the various tables. This summary information is not intended to be an endorsement by GBA and should not be relied on without additional research and validation.

Working from Home

Susan Martin and Dan Cassidy - Moderators

1st session – 11 people

2nd session – 10 people

Working from home is more common for those who are experienced, advanced in their careers, technical professionals. They do weekly meetings or meet at clients' offices, rental office space, coffee shops, or even a post-office.

Several of the participants worked from home at least a few days a week.

Working from home can be good:

- Can become more efficient working from home, avoiding time in the traffic.
- Concept of flexible work space (free address)
- Saves money - Cuts down on square footage and equipment needed because you don't need to have space for everyone all the time
- It can be a great way to keep a top talent that has extra ordinary needs (e.g. take two months off)
- Easier for office staff

Working from home is not a good situation when:

- It can create a situation for some to avoid accountability
- For employees that need a lot of collaboration to grow in their career (e.g. entry level)
- Employees can miss out on promotions because they were out of sight.
- Managers of people that want to work from home or in more remote (downtown) offices are reluctant to let people do this because they can't keep an eye on them.
- Working from home creates some envy and jealousy between people that have the work type that allows it to happen versus those who cannot (e.g. lab people).
- Gets tricky to communicate and interact with rest of team who are working "business" hours.
 - E.g. if Admin staff, they need to be available when "regular" work is getting done.
 - E.g. if IT staff, they need to be "on call" on weekends and off hours since staff are working always.
- Most firms do not have formal flex schedule programs, in some firms it happens Organically; the informal programs have "standard" working hours (8-5), allowing people to get done what they need (e.g. kids, exercise)

If there will be a written program it should be performance specific, but it should be flexible, can't set up criteria.

- Millennials value time more than money, they do not want to work overtime or weekends
- The firms can work on fulfilling employees' expectations as much as possible so that they can get to their personal lives quicker. For example, one of the firms opened a downtown office to make their employees close to home, transportation and entertainment. Bottom line, we have a generation that wants flexibility, wants more personal time, so we have to change and/or be creative to meet them half way.

Other Points that were conveyed:

Seems like the mid-sized firms are struggling with the concept more than larger firms and smaller firms

- Smaller firms, they all know each other intimately
- The larger firms have sufficient infrastructure to monitor and make it work
- Stanford survey found that workers are more productive working from home:
- We discussed the idea that it depends on what they are doing
 - E.g. working collaboratively, working on large drawings, multiple screens doesn't work well.
 - E.g. working on a report, working on a proposal, works well
- Maybe we should re-evaluate what we are trying to accomplish with our working time.
- What's most important and how do we accomplish it
- We all struggle with our client's expectations that we respond to their call

Report Reliance

Session 1 - 7 participants

Session 2 – 6 participants

What types of experience have you had?

- Mainly environmental, but more geotech in last few years
- Some charge, some don't, depending on perceived risk and client relationship
- Terms to third parties must be same as with client
- Need to be VERY careful providing reliance for geotech projects
- Reliance requests are often last minute
- New issue – e-mails with professional judgments but without reliance limitations
- Many letter reports don't have reliance language in them
- Geotech reliance requests are most often lenders, but may be design team members
- One of the GBA member-firm does 5,000 Phase I ESAs/year with lender reliance and no lender suits
- One participant used the GBA doc and found it useful for geotech reliance
- Is construction spec compliance certification to a government body a form of reliance? Probably not because the government body is not part of the transaction
- Won't offer reliance letter for geotech; won't provide enviro reliance without fee
- Rely on reports at your own risk without specific reliance letter
- One had litigation re: reliance; site had hard chalk that needed to be pre-broken for sheet piling; contractor's bid included condition that they could rely on geotech report; owner accepted the condition and was the one who had to settle claim from contractor who assumed softer materi

What have you learned?

- Should not give geotech reliance to design team members; that's what contracts between them and owner are for; unless you're in a state that allows suits without contractual relationship
- There's a difference between using and relying; reliance means a contractual relationship and a means to direct suit
- One option is to update reports at higher fee than allowing reliance on older report (geotech)
- Requests for reliance can be turned into new projects and clients (opportunity to update the findings)
- It's probably only a matter of time before reliance enters the CoMET world
- Should have negative reliance language in CoMET reports; also limitations based on level of observance
- Add hyperlink to project/standard terms and conditions in every email.

Poor Performers

Generational Gap

- Staffers with decades of tenure “milking” their way to retirement
- Young leaders’ challenges dealing with older subordinates; i.e.: generation gaps
- Older employees with sense of entitlement

Attitude

- Attitude versus energy. Animated debate over ability to “define” attitude. Easier to define positive or negative energy.
- Participant indicated they are developing new criteria to be followed by management level staff that avoids reference to attitude

When do you deal with a poor performer?

- Common theme is that co-workers know who is performing and who is not
- Comments indicated that eliminating a poor performer resulted in feedback from other co-workers, such as “it’s about time”, or “what took you so long”.
- Removing the bad seed increased productivity, even if it also increased the individual workload of coworkers
- Several attendees confirmed that reassigning, or terminating a poor performer often resulted in the poor performer expressing relief, or gratitude because they were free from the stress of a position they knew wasn’t suited for them
- A reference was made to the “Peter” principal in that some people simply can’t cut it at the position they have been placed. The book “Good to Great” was referenced as discussing such a principal where people are promoted to the point of failure. Good discussion followed about reassigning people to their previous task, rather than losing what was a good employee until they were put in a position they simply were not capable of performing well in
- Considerable discussion about why don’t people act sooner. In a tie-in to the morning session, many indicated they would ask the “what if” question sooner
- No one could point to an instance where a poor performer was finally removed and there was a permanent wound or cavity left in their absence
- Failure to act on removing a poor performer can result in loss of other employees. Loss of those employees is likely worse than parting ways with the poor performer

Dealing with or approaching poor performers

- In one situation two poor performing employees blamed each other, but not addressing the complaints directly to each other. The supervisor put the two persons in a room together and he proceeded to air out the differences. It turned out that each of the performers were surprised at what the other was frustrated and they could agree on a remedy, that included conversing with each other, resulting in improvement of both persons
- Another similar situation was approached by addressing each poor performer separately, but also having equally successful results
- Suggestion was presented that supervisors should work with all staff, including poor performers, to establish expectations that are definable and/or measurable.

- It becomes easier to confront a poor performer and say “we agreed on these targets and expectations, and you have failed to achieve them”. Basically, engage the non-performers and get their input on how to get where you want them to be
- One firm hired a corporate psychologist that they keep on retainer
- Do performance improvement plans work? Are these plans used? Most at table said they have used and they don’t work.
- Employers spend all their time on trying to fix falling stars. They should be spending their time on developing the rising stars.

How do you define a poor performer?

- Question was posed “how do others define poor performance”? Is poor performance based on financial impact? Attitude? Impact on others?
- General discussion around the table revealed any one of the three reasons, or any combination of the three could be cause to consider someone a poor performer.
- If you are having the “unpleasant conversation” with the poor performer again and again, that should confirm the poor performance and action should be taken.
- If you have a conversation or confrontation with a poor performer, do you exit the conversation feeling that your energy has been drained, or that your energy has been lifted? If energy has been drained, then it is confirmation of poor performance and lack of constructive development. If the energy is lifted, then the conversation was productive and perhaps the poor performer can turn the corner.
- There are four ways to look at performance:
 - Great performer with great attitude
 - Great performer with poor attitude
 - Poor performer with great attitude
 - Poor performer with poor attitude

The two middle categories that are the problems and are difficult to deal with
- How to deal with employee substance abuse issues that are known, but have not been an issue in the work place, but employees know that they have a problem when away from work?

Cross-Selling

Moderators: Patrick Klima (GTA) and Eric Rehwoldt (Schnabel Engineering)

In addition to the two moderators of this Round Table, seven participants contributed each to Sessions 1 and 2. The following is a summary of discussions from both sessions:

- What's in it for me? Provide financial incentives to BD professionals, Seller-Doers and Staff to promote cross-selling of Company services, including bonuses.
- Invest in Client relationships. Learn about Client needs and 'pain' throughout the life of their project cycles. Explore where your Company services can address your Client's needs/desires at various stages in project.
- Bring experts with you to Client meetings that represent relevant services of your Company during the project planning stage, and/or when issues are encountered by your Client where your Company can 'save the day'.
- Celebrate the success of multiple office sharing in your Company, and success of cross-selling sales to enhance services to a Client. Acknowledge the strategies and success of individuals in your Company who are effective 'cross-sellers'. This can be done by public acknowledgment through the office/Company in emails, newsletters, etc.
- Apply a 'pure sales' incentive to your 'sales' people through traditional bonus reward for successful 'cross-sales' of Company services. However, if more than one individual supported the sale (e.g., service 'expert' brought in to Client to support the close of the deal with the Client), who gets the bonus? Will this approach create deeper silos?
- The common challenge in cross-selling services in Companies is breaking down the 'silos' between groups/offices to allow knowledge transfer and learning about other company services and capabilities.
- Promote cross-training of staff wherever possible between service groups. This simultaneously builds knowledge and understanding with staff on multiple services offerings of the Company, and will put them in a position to help promote multiple service lines to Clients with more comfort and confidence as they themselves become 'seller-doers'.
- Share experiences and lessons learned between different groups in a Company or office in an informal lunch 'n learn type meeting, internal newsletters, etc. In this way, staff become more familiar with the scope of projects and terminology of different service groups.
- Build trust between staff of different service groups by sharing what each group does and how they do it. Give opportunities for staff to work on projects that involve a variety of service offerings and learn from experts in the firm.
- Develop trackable cross-selling 'sales goals' that can be understood and measured by the Company 'sales team' at every level. This instills a 'shared responsibility' between groups to meet cross-selling goals.
- There should be a culture of 'Company First' vs. 'Department First' to break down the silos and reduce 'service islands'. Likely more achievable in a small to mid-size company with fewer offices.
- When managing projects that involve multiple services, there should be a main POC with the Client (usually the project manager), but there should be accessibility to the technical leads on the project by your Client as appropriate. The Company project manager needs to ensure a smooth handoff at the right time with technical leads on the project. In that way, the Client can build confidence and trust in other technical service leaders in your Company.
- There needs to be multiple relationships developed between key persons in your Company and key persons in your Clients Company. This is healthy, improves the cross-selling

potential, and gets away from the one person 'Client Manager' concept. This is especially important in mid- to large-size firms.

- Regular meetings should be held with Company department/service managers to develop a comfortable dialogue, share experiences and encourage cross-selling and cross-training of staff.
- Set regular business development meetings with key service area managers and key BD professionals from different service areas of the Company. Share market intelligence and opportunities. Investigate opportunities to expand scope of services for targeted project pursuits.
- Focus on a culture of cultivating Clients. Everyone in your Company is a 'Seller-Doer'.
- Help your Client manage their risk; inform, educate, and advise your Clients where project risks lie, and help them manage these risks by bringing multiple service offerings to bear, where appropriate.
- Give incentives to Company service managers to encourage collaboration and cross-selling of services, and call out managers that are not collaborating. Set up reward system that encourages collaboration, and not 'silo-ing' of services.
- Involve everyone in your Company in cross-selling services. For example, add a BD topic to safety meetings for technicians and provide incentives for promoting Company services at their level.
- Develop internal 'guide to business development' and 'elevator pitch' for cross-selling of services on a typical job site for the field professionals and professional staff to see who in these groups 'get it' and can be developed into future effective business developers in your Company. It was offered that about 40% of staff 'get it' and could be effective future business developers and cross-sellers.
- Use your Company 'Strategic Plan' as a publicized guide for BD staff and seller-doers to cross-sell.
- Provide formal training on 'cross-selling' of services for staff. This is considered easier and more important to do in small- and mid-size firms.

Employee Retention and Satisfaction

Session 1

Moderators: Victor Barchers and Bryan Field

Participants: 8

What is the cost of losing an employee?

- Lost time associated with training, developing and investment of the employee.
- Morale and stress on management and coworkers who have developed relationships with the lost employee.
- Not all employees will stay with your firm. Sometimes the loss of a difficult employee can boost morale and productivity of other employees.
- Important to be proactive and engage with valued employees who have been rumored to have other opportunities/offers from other firms. Companies are always looking for strategic hires who require little training during onboarding.
- Potential costs associated with losing clients based on established relationship with the employee, or having other employees follow that person to employment with a competitor.

What keeps people at your company?

- The right salary and benefits package.
- Work life balance is very important and will vary between employees. Provide flexibility for all employees to allow them to succeed.
- In-lieu of personal performance reviews, conducting “stay or check-in” interviews have been beneficial and provide an open forum for engagement with an employee.
- Change can be a good opportunity for the advancement of employees. Companies need to provide growth advancement opportunities for employees to be happy and engaged.
- Important for managers and leaders of the company to understand their staff and what their motivators are. Constant communication will provide engagement, make them feel part of the team and allow a joint effort in determining growth opportunities.
- Younger staff greatly appreciate the investment from their firms to allow them to attend conferences, training, etc.

What challenges do you have retaining younger staff?

- Transitioning an employee/engineer from a field role to an office design role. Often times, staff will also change from an hourly to salaried pay structure during this transition.
- Assigning a mentor, who is only a few years older than the younger employee, to provide a balanced perspective for the younger employee.
- Encourage young staff to be members/committee members of societies, attend conferences and be engaged with other young professionals in their field.
- Important for young staff to understand the benefits of spending their first couple years in the field. Set expectations and goals during the recruiting/interviewing phase so they understand the position and the benefits of the field experience to advance their career down the road.
- After an employee spends time in the field and demonstrates to contractors and clients they are a hard worker and valued asset, sometimes those employees can get poached away.

Supervisors need to be engaged during their field experience to help guide them to the next step of the process.

- If a project manager, senior engineer or supervisor shows passion/excitement towards their projects and job that positivity will resonate down through the younger staff.
- Bring junior staff to client meetings and other business development opportunities. However, be sure to engage the staff who are interested in business development.
- Difficult to advance every employee when you need them doing the tasks they are already doing. Challenging to invest in training a new employee to allow for other to move up and still be profitable and meet schedules. Hard to keep staff interested in the same mundane tasks.
- Challenging to establish realistic expectations with junior staff in terms of how long it takes to progress from field to office responsibilities and how important the field experience will be in their long term development.
- Challenged with retaining 3-5 year employees that become very valuable with professional licenses, experience, but not commanding senior level salary.

Session 2

Moderators: Victor Barchers and Bryan Field

Participants: 12

What is the cost of losing an employee?

- High. A lot of investment goes into the onboarding, training and mentoring process. A company could also lose revenue depending on the type and level of employee lost.
- People don't quit their jobs, they quit their bosses.
- Morale within the department or office could drop if the lost employee was valued, engaged and trusted by peers/coworkers.
- There is a difference between losing an entry level or senior level employee. Aside from the lost training time from losing both a young or senior level employee, you could lose the knowledge, relationships (internal and external) and even the client to the senior staff member.
- Client satisfaction could go down from losing an employee if the same level of trust, delivery and expectations are not achieved with another project manager.
- The loss of an employee is going to happen. It's important to have a proactive process in place to handle the situation when it arises. These losses are also growth/advancement opportunities for younger, driven staff.

What keeps people at your company?

- Define growth and advancement opportunities for all levels of employees. This provides clarification for both the employee and the company.
- During the interview process, select employees interested in the role rather than just willing to take the job because it is available. Increases chances for longer term interest and engagement from the hire.
- Educating staff on their total compensation package to mitigate "grass is greener" perception associated with higher hourly rate or salary.
- Typically, a variety of work and projects (small versus large) will keep an employee engaged and excited.

- It is important to reward your employees through raises and bonuses when they have met or exceed their personal performance goals established for that project or year.
- Having an engaged and positive manager that knows and understands their employees. Good project managers/supervisors are vital to the moral and engagement of staff.
- An employee who knows they have a voice that can be expressed and heard by senior leadership.
- Important to have recruiting and interviewing processes in place to hire the best employee for the position and culture of the company.
- Providing an employee positive feedback and reassurance they are appreciated within the company.
- Rewarding employees with movie tickets, Starbucks gift cards, cook outs, etc.. can go a long way with all levels of employees performing and doing good work.
- One company has a leadership team that focuses on employee engagement and shoot to have discussions with employees on positive, neutral and negative aspects about the employee's job or even company initiatives. It allows for an open discussion that they found valuable.

What challenges do you have retaining younger staff?

- Field staff typically are drawn to their baseline salary and do not focus on or understand their total or global compensation package.
- Supervisors/managers need to provide a flexible and creative work atmosphere that includes growth opportunities and a level of trust with their employee.
- Younger staff have a different mindset than the previous generations.
- Good managers need to adapt to help engage younger staff. Some folks have had success with personality assessments of staff to identify who are the best people managers.

Ethics of Business Operations

Moderators: Lee James and Derrick Shelton

Total Participants Session 1: 6/7, Total Participants Session 2: 8

Session 1

- Ethical Financial issues become a concern when there is a merger between two companies. One participant discussed that the buying firm accused the acquired firm of ethical issues with respect to accounting practices. The acquired firm thought they were being “aggressive” as opposed to being unethical. Ultimately, the acquired firm had to change their practices.
- Participants questioned if it is ethical to low bid the design work to get field services, but doing so knowing that you will be providing a lower quality of service. The opposite question is valid as well (low bid the field work to get future design work).
 - Most thought this was not unethical, but rather a business model approach.
 - Where this could be an ethical concern is when a PM asks employees to not charge their time in order to stay within budget on an aggressively low bid.
- It can be unethical when PMs force junior staff to only charge 40 hours; especially when Leadership has made it clear not to do this.
- Larger companies have ethical hotlines to give employees a way to report issues, but what about smaller companies that can’t afford that or do not have the structure in place? This can make it a challenge for junior staff to report unethical practices. What should small companies do?
- Question of inquiry by one participant - Does your firm have ethics training?
 - Some participants indicated that their firms did, but most did not.
 - Those that did were larger.
 - Training is somewhat generic.
- Are there ethical issues when client asks you to “soften” language in a report? Most know when the softening degree presents an ethical issue. It is up to the consultant to discuss this with client and make them aware of the implications. Some have suggested getting client to provide this request in writing to the consultant to relieve them of any liability associated with changing language.
- Ultimately an individual’s morals should align with client’s morals or else there will likely not be a long-lasting relationship.
- How do leaders of firms make sure the right ethical choices have been made?

- SEE BELOW REGARDING ETHICS BEING DRIVEN TOP-DOWN
- Can you train ethics?
 - People are ethical or not ethical; not sure if you can “train”.
 - Training is more likely to provide awareness vs. change ethics.
- Some clients may ask you to stretch your moral limits; that requires a moral decision by the individuals

Session 2

- Participants discussed if there were ethical issues with flex time and providing different arrangements for different staff. Most participants thought it wasn't an ethical issue so much as an issue that could make other staff members upset. One participant indicated that this was common in his company; that everyone had their own “deal” and others understood that.
- Maintaining ethics as you grow can be a challenge. How can you ensure that new strategic hires are operating ethically? There is difficulty managing to assure ethical decisions are carried out by all employees. The new employees may perform well, but makes leadership wonder if something unethical could be going on since the new employee is not known well. A good step is always asking the question of whether ethical actions are occurring.
- Surprisingly, most participants have dealt with situations where they learned that employees were untruthful on their resume and have ended up hiring employees with fake degrees.
- Ethics can be different in different parts of the country or in different countries. In the Mideast, bribes are common as the way that business is done. International work adds additional complexity to definition of ethical behavior. International work can require you to recalibrate your ethics.
- How to deal with clients that expect favors such as tickets to sports events, gifts, hunting trips, etc.?
 - Participant discussed situation where a client asked for a gift of guns and told firm they could bill it as time on a future invoice to be reimbursed. When a new hire learned about this and asked management about what was going on, management was aware, but allowed it.
 - Ethical culture can start at the top. If unethical behavior is tolerated, does that make employees lower their standards?
- Nepotism can lead to ethical issues because it can influence decisions relative to reduction in forces, promotions, etc.

- Can ethics be driven top-down?
 - Ethics are driven by the top leaders.
 - When dealing with clients/vendors/etc. → yes
 - When dealing staff to staff → probably not
 - Participants said leaders should lead by example,
 - Leaders of firms should state specifically what their expectations are for their firm.
 - Ethical standards need to be communicated to all in the Company.

- Can ethics be taught?
 - The second session group had similar thoughts as the first session group. You can teach awareness, but most people have their own sense of what they feel is ethical.
 - Making unethical decisions gradually occurs over time and sometimes may not be a specific decision made. Participant gave metaphor of increase heat under the frog slowly in a pot of boiling water.

- Two common thoughts from both sessions
 - Ethics and morals are similar but different. Usually if something is immoral, it is also unethical. But sometimes things may be unethical, but not necessarily immoral. What is the definition of ethical?
 - Ethical vs. illegal

Risk Education of CoMET Personnel

Moderators: Pat Donovan and Randy Martin

A total of 11 participants were present in the discussions for the two sessions.

Training:

Risk Education starts with how well we train our personnel technically. All agreed we should do more to educate our field personnel. Many firms do a great job of training the project managers and professionals on the risks associated with CoMET services, but almost everyone agreed this information does not always effectively make it to our “first line of defense”, our field personnel.

From a technical standpoint, we all agreed (as a minimum) our field personnel should have a complete set of plans and specifications (including updates as they occur). This was recognized to be more practical on large projects in which our services are provided on a full-time basis, but still important on other projects as well.

Everyone recognized the challenge of organizing schedules for meetings and training. Early morning meetings and Saturday morning meetings were preferred, because we never get “rain days” when we need them. To be fair to our employees, meetings on Saturday mornings were planned to have enough substance, so that we’re not wasting our people’s time. For example, it may be unfair to have an employee drive 1 hour (each way) from home for a 1 hour Saturday morning meeting.

Nuclear density gauges are common for testing of soil during fill placement. The group collectively recognized the importance of training with the nuclear gauges, since those not properly trained could see it as a “black box” and not understand how it works.

As our personnel gain experience and confidence in the technical aspects of their job, there needs to be some companion training in areas of Loss Prevention. Those are discussed in the following sections.

GBA has training material available on the website, specifically good information on the use (or avoidance) of certain loss prevention words.

Identifying the Unexpected:

In some locations, there are discrepancies between jurisdictional (county, city) specifications and project-specific specifications. Which ones have precedence? What guidance do we provide our field personnel when this occurs?

Some states require a Professional Engineer’s stamp on daily field reports. When the CoMET field personnel become the Professional Engineer’s “eyes and ears” at the site, communication between them is very important. At the beginning of the project, the Professional Engineer should clearly define the expectations of the field personnel, and when appropriate, identify their “boundaries”. As a minimum, the CoMET field personnel should discuss their observations/findings with the Project Manager (or Professional Engineer, based on the project) before leaving the site each day.

Getting our Senior Personnel Involved:

With more turnover in our staff (which could be a generational challenge), the importance of well defined (and repeatable) education and training was identified. For example, if we have a new “class” entering our workforce each year, can we ensure that everything we’ve taught one group is “passed down” to the next? If our methods of training and education only involve one-on-one training by your senior staff, we’re probably losing something each time it is transferred from one person to the next.

For new employees, it is very important they have an experienced companion during their training period. That experienced person should be a good communicator. A good communicator can talk through a test or inspection, not just show the lesser-experienced employee they know how to perform it.

Certifications were discussed, not only as a requirement in certain jurisdictions, but as a career path for our employees. Certifications are an excellent way to recognize what your experienced personnel have learned over their careers.

In situations where a senior CoMET person trains and mentors a junior person, what incentives do we provide? Rewarding the senior person for properly training new staff reinforces the importance of the training, and shows appreciation for the senior person’s knowledge and experience.

Selection of “trainers” is very important. Have they been doing it for so long, they can’t remember what a junior person “doesn’t know”?

One area of concern with experienced staff is complacency. If the senior person has seen “good enough” work in the past, there could be some complacency relative to strict adherence to plans and specifications. Someone accepting work that is “good enough” probably isn’t someone you want training junior staff. With senior staff, we should always be on the lookout for complacency.

Another area of concern is arrogance. One example observed by many at the table involved a senior CoMET metals inspector and a lesser experienced structural engineer. The metals inspector may identify a welding detail that “just doesn’t work”, but communicates it in a way that embarrasses the structural engineer, or even causes a costly change order on the project. While it is entirely appropriate for the metals inspector to discuss their observations with the structural engineer, discretion, tact, and professionalism are oftentimes needed.

Being Good Communicators (Your Firm’s Representative at the Site):

We discussed the importance of our CoMET personnel having good inter-personal skills, since they have to deal with many different personality types on project sites. To educate their personnel, some groups have used one-day or two-day seminars (such as those provided by Fred Pryor Seminars® or SkillPath®) to help their employees in areas such as “dealing with difficult people” and “communicating with tact, diplomacy, and professionalism”.

Know when to call in support. When needed, a CoMET employee should reach out to the Geotechnical Engineer of Record for soil related issues. This can be a challenge if the CoMET firm did not perform the Geotechnical Exploration; therefore, the CoMET Project Manager will likely need to get more involved.

During the site grading phase, it is important the CoMET personnel communicate frequently with the Geotechnical Engineer. Issues to discuss could include (but are not limited to): What challenges should we expect; how often should the CoMET representative communicate with the Geotechnical Engineer; what is the proper procedure for communicating unexpected conditions.

Relative to decision making, CoMET personnel should always know when recommendations are warranted. In some instances, it may be best that the CoMET personnel default to some project-specific written language or document.

When discussing observations and/or reporting results, being specific and qualifying what the CoMET personnel did (and did not) evaluate or test is very important. Specifically, part-time observations should be presented that way, and should not be written to represent full-time observations. Avoid loss prevention words such as “all” or “every”.

Occasional failing test results or minor discrepancies can occur on almost any jobsite. However, repeated instances can cause the CoMET firm to commit additional resources (time and/or personnel) not originally planned for in the budget. CoMET personnel should be trained to identify these patterns and communicate (document) them both verbally and in written form, in the event documentation for change orders are needed in the future.

Better Use of Technology:

Getting personnel together can be difficult. Some groups identified that meetings can more easily be “recorded” for those not attending, to view when they are available. Further, some locations use “face time” on their electronic devices to increase attendance. Text messages (group texts) are also good to get out short, immediate information to their staff.

Another good, but underutilized, tool for fighting loss prevention challenges is the use of photos, since almost all our field employees have a device that can take them.

Some groups are using data reporting systems to help with information delivery. However, the CoMET firm should very carefully vet out any “standard” language being used, and educate their field personnel carefully on what different variations of the same “standard” paragraph could mean.

Many groups are using on-line videos for training. In addition to searching for topics on the internet or YouTube®, you can find many training links on the CoMET page of the GBA website.

Supervisor Training

Session 1: 10 people

Session 2: 5 people

Moderators – Stephen Patt, Christopher Clarke

Training Currently Offered by Companies:

- 1) One firm offered a future Leaders Program – was done one time and it didn't seem to work very well
 - a) Outside consultant hired to provide this training for 10-15 candidates
 - b) Did not provide additional information on how the business was run by the company but provided "tools" for people to learn how to manage other people
 - c) Employees were given project assignments to work on and were split into teams.
 - d) A better selection of candidates would have been more helpful
 - e) Candidates were identified by branch leaders/supervisors
- 2) One firm offered educational time to spend on self-improvement
 - a) 10% of employee's time to be spent on education
 - b) Can be technical or managerial/soft skills
 - c) Employee creates a plan for educational items and is reviewed/approved
- 3) Several firms mentioned FOPP as a tool for supervisor training.
- 4) One firm currently has a committee to develop program, as one doesn't currently exist beyond FOPP
- 5) Several firms indicated they had existing programs, but most were more of a focus on project management
 - a) Including:
 - i) Technical items
 - ii) Budget management
 - iii) Client management
 - iv) Minor HR items
 - v) Some financial items
 - b) Doesn't include specific management training
 - c) Training includes both internal training and use of external tools/programs
- 6) Online training that is self-guided (provides both technical and financial training)
- 7) Companies may present select topics that employees can voluntarily attend, open to all employees
- 8) Currently the company uses a "trial by fire" approach, promote technical people into supervisor role. They are looking to:
 - a) Slowly provide training on a policy/topic by topic basis once a person is in supervisory role
 - b) In progress of developing a first time supervisor training
 - c) Current training is mainly HR based
 - d) Having difficulties bridging the gap between younger employees and supervisors. They feel a communication gap or lack of understanding between the older and younger staff assuming new roles.

- 9) One firm has tried to implement a full supervisor training program including bringing in external consultants to develop training program/train. Limited success as it seems after a year, the knowledge/training has not been retained.
- 10) One company indicated their leadership program was well developed with many internal resources and also external consultants. The company offered two different programs:
 - a) Fast Forward – 0-2 years' experience
 - (1) Mainly provided project management type training
 - b) Right Start – 2-7 years' experience (20-30 people/year)
 - (1) Soft skills training
 - (2) Decision making training
 - (3) Some technical items also included in training
 - c) Company had 1-3 people providing full time training, these were not technical business people but had educational backgrounds
- 11) One firm offered a robust program for supervisor candidates that included:
 - i) Outsourcing training including programs such as FMI, FOPP, PSMJ.
 - ii) Internal Project Management Academy program
 - iii) Offered external training on communication, personality, and leadership (some of this training may not be company/industry specific)
 - iv) Internal training developed by full time corporate staff (full time people with educational background)
 - v) Classes were registered so capable of providing PDH and CEU credits
 - vi) Use of external consultants for
 - (1) Personality type studies/training
 - (2) Behavioral based training
 - vii) Training broken out by practice areas
- 12) Small firms internally train through mentoring and staying involved with their junior staff.
 - a) Supervision previously only provided by Principals/Partners. Recognized that it needed to be passed down to younger staff to keep company multigenerational.
 - b) Specific internal program not feasible
- 13) The cost to prepare a training program can be significant for large companies.
 - a) One firm reported their program required 60 hours of staff time just for the training sessions.
 - b) As mentioned one firm had full time dedicated staff

Strengths/Identifiers of Good Supervisors:

- 14) Characteristics of Good Supervisors and leaders included:
 - a) Strength finders – help provide best ways for people to interact, have an ability to teach others and help. Lends their time to help.
 - b) Good with people: Intuitive, aware, curious, respectful, leads by example
 - c) Commitment to company/Get it
 - d) People centric/humble/empathetic
 - e) Being comfortable not knowing
 - f) Timeliness, meets deadlines/commitments, able to multitask
 - g) Self-accountability. Take responsibility for their work product/actions
 - h) Learns from mistakes

Other Items:

- 15) All agreed that employees generally leave bad supervisors.
- 16) Most large firms had some developed program or were working to develop a supervisor training program. Smaller firms generally did not, or relied heavily on mentoring.
- 17) Having difficulties teaching and promoting technical people to supervisor roles (the personal skills are not as inherent to technical people)
- 18) FOPP training considered to be a sort of supervisor training

Taking Down Silos

Gregory Hebel, PE, and Nigel Miller, PE, moderators

The number of participants in the discussion for the two sessions was 11 and 9 = 20 total participants.

Resources GBA should/could consider producing around Silos

Nothing came up as pressing so might not be a need

External Resources – Nigel Shared his copy of:

Book – Silos Politics and Turf Wars – Patrick Lencioni

- a. Where do you see silos in your organization?
 - i. **Geography / Locations** – revenue or client sharing (lack of face time seen as primary component to siloing – discussion around the use of technology to improve (skype video calls, etc.)
 - ii. **Disciplines** – differences in profitability (business models), challenges with cross selling
 - iii. **Business Lines / Market Sectors**
 - iv. **Sales vs. Operations vs. Corporate**
 - v. **Engineer vs. Technician** (or Office vs. Field or “Carpet vs. No-Carpet”)
 - vi. **Client-based silos**
- b. How do you minimize impacts / break down silos?
 - i. **Align objectives**
 - ii. **Incentive systems** –
 - 1. including equitable staff sharing and systems aligned with the clients and overall company’s best interests at heart
 - 2. Managers don’t stick just on the numbers – client service, experience, staff morale / opportunity – managers making the wrong decisions can be demoralizing – takes away the fun
 - iii. **Raise P&L measurements up a level**
 - iv. **Leadership and culture key** to driving / sustaining improvements
 - v. **Running other thoughts**
 - 1. Revenue follows the man – incentives to sell... multi-disciplinary projects are the easiest to share staff
 - 2. Changed from 100% geographic to service line – which is more effective...
 - 3. Matrix organization – incentives and measurements across multiple geography / sectors / disciplines.
 - 4. Success – top down, based on client needs, make sure P&Ls aren’t too
 - 5. Raising incentives to the top line
 - 6. BD side, I can’t afford to go after a job because I won’t see revenue
 - 7. Spot bonuses as incentive.
 - 8. Revenue Sharing – is simpler better? – yes (but not always the arrangement)
 - 9. Rules that influence decisions – create silos
 - 10. All comes down to people and trust

Survey of participant top issues / strategies / etc. around silo-ing:

List of top strategy

- No silver bullet – leadership needs to break down silos (Broad Agreement on this)
- Bram Mcclenon – all structures work for a period of time – important to maintain focus – not structure driven
- Managing by spreadsheet – doesn't reward sharing – comes down to being leadership driven
- Communication is important – especially for young staff
- Accounting systems and other systems can create silos
- Silos can be solved by good management / leadership

High level nuggets – wrap-up – Session 1 (1 per participant)

1. All comes down to money – lowest prices from subs
2. Biggest concern – competition between offices (not in really large office say 1000-person office)
3. Class system / money (incentive matrices different across the classes)
4. My office versus your office – lack of caring
5. Culture; if it doesn't start from the top
6. Departments – Geo / vs CoMET – accounting down as a whole
7. Not being able to afford silos – large exploration group – investigation group vs. engineers – not in office - isolated
8. Client control – “my client” – clients are power
9. Geography – accountable to those they can look in the eye
10. Carpet – no Carpet and client control
11. Corporate / no corporate

High level nuggets – wrap-up – Session 2 (1 per participant)

1. In developing new parts of a business – new structure / different incentives – needs time to develop
2. Buddy system – partner strong and weak offices and individuals
3. Face time is important – trust is key – accountability
4. I don't know you exist – don't work together
5. Ideal answer – profit is key, gives you flexibility –
6. Recognize cross selling – show the recognition (announcements, spot bonus, soft incentives (meeting))
7. Inclusion is the best motivator – 100 person meeting with 1200 people – have fun together
8. Internal technical seminar for awareness and breaking down barriers
9. Went to practice area – standardized rate schedules across service lines – across 13 states – discussion about potential difficulties – retained flexibility to adapt per project / client