

Process Intervention  
**ROY PAULSON—PART 2**

*Barry-Craig Johansen*  
*University of Minnesota*  
*Copyright © 2006 Barry-Craig Johansen*

After two weeks of 12- to 18-hour days, Roy was running ragged but making good progress, when he got a call to attend the weekly NEWCO managers' meeting the next day. Roy had attended these in the past but had been allowed to miss them lately so he could focus on building the training plans and getting the critical maintenance tasks documented. Sandra told him that the group would like an update and an estimate of the time required to complete the project. Roy spent most of his evening putting together a computer presentation outlining the tasks to date, a pert chart with critical path, and estimated milestones for completion.

The next morning the meeting started with the usual pleasantries, some dark humor about the state of the organization, and the usual complaints about the regulators who are "squeezing the life out of our industry." Roy had come to know many of the managers, and, while he didn't socialize with them, he knew they were bright and capable and had been hand picked by Sandra. She had worked with many of them in the past, and they were known to be an effective turnaround team.

Sandra opened the meeting with an overview of the company. She reported that, among other things, NEWCO was now facing increased financial pressure. MWD had just announced a price reduction for its products, and NEWCO's share of the market was continuing to decline. NEWCO was also discovering that their emphasis on hiring the disadvantaged, while good social policy, was requiring more time than anticipated to train the new hires and make them productive employees. Training was becoming increasingly important.

Sandra introduced Roy to the group. "Most of you know Roy or at least have seen him working around the plant. He's the person who finished the receiving analysis in record time and is primarily responsible for the gains we've made in that department." This was met with some light applause and murmurs of approval all around the table.

"He's now in the final stages of developing our overall training plan for presentation to the regulators and is also finishing up the SOPs for maintenance. Having these two components in place should satisfy the regulators, getting them off our back, and easing the pressure so we can concentrate on needed capital improvements and increasing our market share. Roy, bring us up to date."

Roy went through his presentation, which lasted about 30 minutes. He outlined the progress to date, his current work, and estimates for completion of the training plan and SOPs. The group was surprisingly quiet at the end of the presentation. As he stood at the front of the room, Roy became increasingly uncomfortable.

Finally, Sandra spoke up. “Roy, as you know, we’re all very happy with the work you’ve been doing and the way you get along with the line staff. However, according to the information you just presented, we’re going to miss the regulators’ deadline by almost a full month. You knew the date had been pushed up, didn’t you? We’ve been talking about it at almost every staff meeting for the last few weeks. We can’t afford to miss the deadline!”

Roy was quite surprised. “No, I didn’t know about the change in the timeline. I haven’t been to these meetings as I’ve been out on the floor working on the project.”

One of the others asked, somewhat gruffly, “Well, don’t you at least read the meeting minutes?”

Roy said that he didn’t even know that there were meeting minutes. At this, some of the team started to roll their eyes, talk quietly to each other, and look at Roy. It was clear they were reassessing their consultant’s ability.

Just when things looked to be getting even more unpleasant, Sandra spoke up to the group. “Look, this isn’t the time to start questioning our decisions. If Roy didn’t get the minutes, it might be that I forgot to get him on the distribution list. We can deal with this. I’ll meet with Roy and Ken this afternoon, and we’ll find a way to get this fixed. We’ll work it out. You all know me, you know Ken, and we all know Roy is a capable and hard worker. Things will be OK; we’ll come up with a plan.”

The meeting broke up, and Sandra asked Roy to come to her office after lunch, around 1:30 p.m. Roy went to lunch but didn’t have much of an appetite. He knew Ken by reputation only. Ken had been a consultant for a number of years in the same industry as NEWCO when Sandra asked him to join her team. He had many contacts in the industry, as well as in the trade’s press, unions, government, and regulatory groups. Ken was often described as being “wired into the industry.” Little happened that he didn’t know about.

Roy got to Sandra’s office at 1:30 p.m. to find Sandra and Ken having coffee over the remains of lunch. “Come in, come in,” said Ken. “Have a seat over here. Want some coffee?” And he started pouring before Roy could answer. Ken continued, “That was a tough meeting!”

Sandra smiled. “I understand what it’s like to get blind-sided like that. It happened to me a couple of times in the past, and I’ve got to tell you, I didn’t like it much, either! But you handled yourself well. You didn’t get defensive or angry; you just stood your ground. Well done.”

Sandra spoke, “I’m sorry you got left out of the loop somehow, but this isn’t the time to start finger-pointing. What we need to do is find some way to meet the regulators’ deadline. Let’s focus on that.”

They discussed the issue for almost an hour, and it became clear that there was just too much work for one person to complete in the time available. Finally, Sandra suggested that Roy get some help.

“Why don’t you hire a subcontractor to help with the documentation? I’ll allocate some additional funds to cover the subs’ costs; we’ll append it to your consulting contract, and include some additional money to cover your overhead plus a little extra for your troubles. I don’t usually like to do this type of thing, but I don’t see that we have much other choice.”

Roy thought about it. This would allow him to get the work done quicker and show a bit more profit. It would also mean that he’d have to spend some time checking the subcontractor’s work to ensure that it fit with the format he’d already developed for NEWCO. The biggest problem would be finding someone with the right skills and experience. Roy wouldn’t have time to train someone.

“I think this would work,” said Roy, “but I’m not sure I’ll be able to find someone who can hit the ground running. We’ll need someone who not only understands the industry, but who also has a training or work analysis background. I’m going to be hard pressed to find someone, especially on such short notice.”

Sandra spoke to Ken, “You’ve made a few contacts and know who’s who. Can you work with Roy to find someone with the skills we need?”

Ken thought for a moment, then said, “I can make a few calls.”

“Great, then I’ll go start the contract amendments, and you two map out your plan.” Sandra left Roy and Ken.

Ken said, “It seems to me that the first thing we need to do is build an outline of the overall training plan. This might be a good task for the sub to start with. To do this, he won’t need a detailed understanding of all the processes. I’ll call around and see if I can find someone to help us. Let’s meet again tomorrow. If we can get someone on-board in the next few days, that will give you the time you need to finish the maintenance SOPs. OK?”

Roy didn’t see that he had much choice, but he also didn’t have any better ideas.