

Taking Best Practices  
to the Operating Teams

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**BEST PRACTICES**

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# Background

During the Start-up of the Delayed Coking Unit, Operator Training was a significant focus. We put 50+ Operating Personnel through "Initial Start-Up Training".

8 of these Operators also went through additional "Board Operator" Training.

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# Background

After a year or so, We started to see a drift or difference in some areas as far as how teams accomplish their "work".

Not deviating from established procedures, but rather, differences in some of the discretionary "stuff" they do.

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# Background

This was most apparent when Operators would work Overtime on other Teams.

Dialog centering around the "Best Way" was becoming more and more prevalent. And it was apparent they, the Teams, all believed that "their way" was the Best.

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# Background

One of our Board Operators finally said:

I'm tired of this!

Let's get representatives from each team in a room and decide what is the:

"BEST PRACTICE"

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# Background

**As a company we had started to devote quite a lot of effort to sharing best practices.**

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# Background

**Internally, Department to department**

**Externally, Location to location,**

**As well as borrowing from other industries.**

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# Background

**Looking back, it is amazing that we really didn't put any effort into sharing best practices among the groups right under our noses.**

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# Background

**Specifically from Operating Team to Operating Team within our own department.**

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# Simple?

# Not Really

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# Our Options

**Put team representatives in a room**

Go 2 out of 3 falls

Majority Rules

**Structure the activity for Success**

Not as easy as it sounds

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We had a couple of years of experience, it is a good time to collect what we have learned and apply it to our existing documentation and practices.

We wanted to create an opportunity to get operators from each team together to discuss various pieces of our business.

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Our intent was to understand, from team to team:

- how things are being done
- differences in how things are being done

And to hopefully identify and agree to a "best" way to do our business.

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**We had assistance from our Organization Development Consultant. We asked her to help us design an activity that would:**

- Identify Problem Areas
- Allow Good Dialogue
- Identifies Best Practices
- Develop consensus
- Capture agreed upon practices
- Deliver a product to Operating Teams
- Measure success

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# OPERATING TEAMS BEST PRACTICES CHARTER

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## Best Practices Sharing Discussion

### 1. Purpose:

To review the current operating practices in the selected plant in order to:

- Identify operating techniques or tasks that are being performed differently from team to team where these differences are causing problems.
- Attempt to agree on a "best practice" for these areas.
- Identify opportunities for improvement both in the operation and equipment, and develop solutions for these opportunities.
- Learn from each other and solve problems together that we are having difficulty solving individually.
- It is not the purpose of this team to make all teams do things the same way and it is understood that there is more than one way to do things in many cases.

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## Best Practices Sharing Discussion

### 2. Proposed Attendees and Roles:

**OPERATORS:** At minimum of one operator from each team

- Participants are expected to act as representatives for their team.
- Action Items will be assigned
- If you do get 2 Operators from one team try to get an experienced person and one who has recently qualified.

**TECHNICAL SUPPORT:** The Unit Engineer and the Operations Specialist.

- They are here to answer technical questions.

**MEETING COORDINATOR:** Someone who has had some Meeting Organization training.

**MEETING SUPPORT:**

**FACILITATOR:** This role may be filled by the Meeting Coordinator.

**SCRIBE:** Familiar with the unit.

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## Best Practices Sharing Discussion

### 3. Pre Meeting Work:

- Prior to the meeting, a specific list of topics will be developed by the Meeting Coordinator.
- Each team Representative will send topics of discussion to the coordinator.
- The Meeting Coordinator will also solicit the Operations Specialists and the Unit Engineers for ideas of possible topics.
- Prior to the meeting a list of the proposed topics should be sent to the meeting participants.

### **Material for the Meeting**

- 2 sets of unit EFDs or P&IDs, along with Board Schematics, & process overviews. Have the Board Schematics made into transparencies or some other multi media format.
- Extra tablets and pens
- Flip Charts with topics listed
- Blank Flip Charts

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## Best Practices Sharing Discussion

### 4. Meeting Process:

- Put up the list topics on Flip Charts.
- Using a 3:1 Multi-Polling method to vote on the topic order for the day.
- Start with the top item from the Multi-Polling.
- Ask for the owner of the topic to share or explain the topic.
- Ask group for understanding of the topic.
- Start discussion. (They have already agreed that the topic was an issue by the Multi-Polling)
- If the topic is a issue for all teams:
  - Agree on the problem
  - Brainstorm solution
  - Come to consensus
  - Specific action items and responsible individuals for each recommendation will be identified.

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## Best Practices Sharing Discussion

### **4. Meeting Process:** (continued)

- If the topic or issue is something that is working for a particular individual or team it will be identified.

Continue the discussion until it is determined why this works, what conditions, and attitudes make it work, and determine if all the teams can create similar conditions for successful implementation.

- Continue down the list of topics in Multi-Poll order.
- The Team Representatives develop a forward plan for getting the recommendations out to the operating teams and the rest of the department.

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## Best Practices Sharing Discussion

### **5. Accountability:**

- Once the "Best Practices" are agreed upon the Team Representatives have the responsibility to share these with their team.
- The Team Leaders (Shift Leaders) must agree to hold folks accountable for the "Best Practice".
- Deviation must be documented.

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## Best Practices Sharing Discussion

### 6. Benefits:

- Develops informal leaders in the teams.
- Commits the team to actions rather than a few individuals.
- Ease of consensus building during the meeting.
- The teams get a consistent message from the meeting.
- Team Representatives allow a rotation of this role.

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## Best Practices Sharing Discussion

### 7. Caveats:

- A lack of effective meeting skills can contribute to an ineffective meeting.
- Corraling a large group is tough  
The success of the Best Practices Session depends on the ability of the group "to get work done".  
One Team Representative from the team (2 if possible from teams that are on days off).
- Get the night shift Team Representatives off shift for the meeting.
- You want to get the correct people in the room.
- Involvement of the Operations Manager should be limited.

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