1:30 PM	Managing Large Projects — Case Study & Learning
Host(s)	Nikole, Tyler & Pete
Attendees	All Consultants
Purpose	Illustrate growth trends in closing large, complex, and multi-site implementations; explore account spidering as a growth strategy; and share internal changes driven by our learnings.
Process	Presentation & interactive discussion
Payoff	Consultants see a clear path for growth, understand the internal structures in place to support them (Implementation Management), and are aligned on expectations around collaboration and impact.
Resources Required	SmartSheet, Dashboard, Client Manager’s Dashboard of Accountability, HFR Refresh







Songs of the Humpback Whale

Track 1 - Why Whales
Track 2 - A Tail To Remember
Track 3 - What A Great Boat

Translated by Nikole,Pete & Tyler

OUR GOAL FOR THIS SESSION

Everyone here sees a clear **Vision for GROWTH**, understand the internal structures in place to support them, and are aligned on expectations around collaboration and impact.

Why? "Governance/White Whale" level engagements will continue provide us accelerated opportunities.

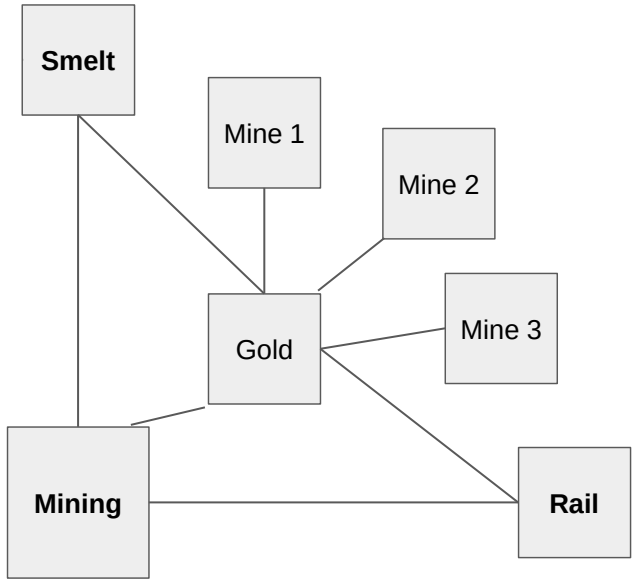
Who? Everyone here plays a vital role in feeding our organizational learning loop.

What? What we've acknowledge as immediate needs to support growth.

How? Process refinement, **Resource** development, and strategic **Support** create the foundation for organizational excellence


Before we dive in!

Track 1 - Why Whales - Governance



What the term Governance Indicates

Corporate level interest

Gets us involved in an advisory or pilot capacity

High Motivation to achieve desired outcomes possible via our solutions

Direct involvement in goal setting and strategy

Scope is large single site size, multiple sites, and/or complex hybrid needs

Need for customized services

Need for multi-disciplinary team to manage

Additional opportunity for training - The Benefit

Multiple - Trainer Certifications, SC, Leadership, Sustainability, OV

High Likelihood - Individual Unit Training

Additional - SC, Leadership, Sustainability

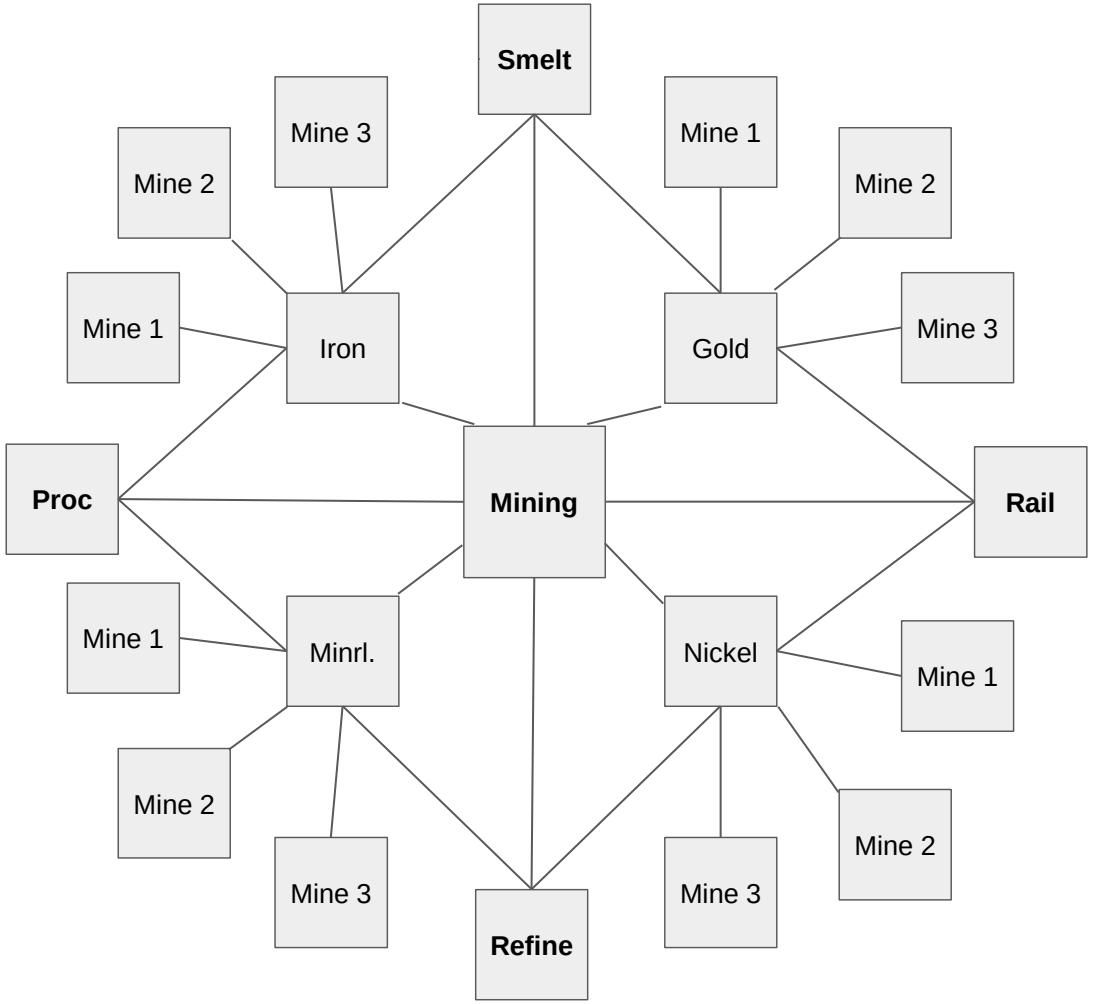
Customized Supports - Leadership, Steering Committee, Communication, Activities, Integration……

More predictability

Track 1 - Why Whales - Spidering

Spidering; the practice of expanding a client relationship beyond a single site or division — moving across the full value chain by delivering excellent work at each entry point.

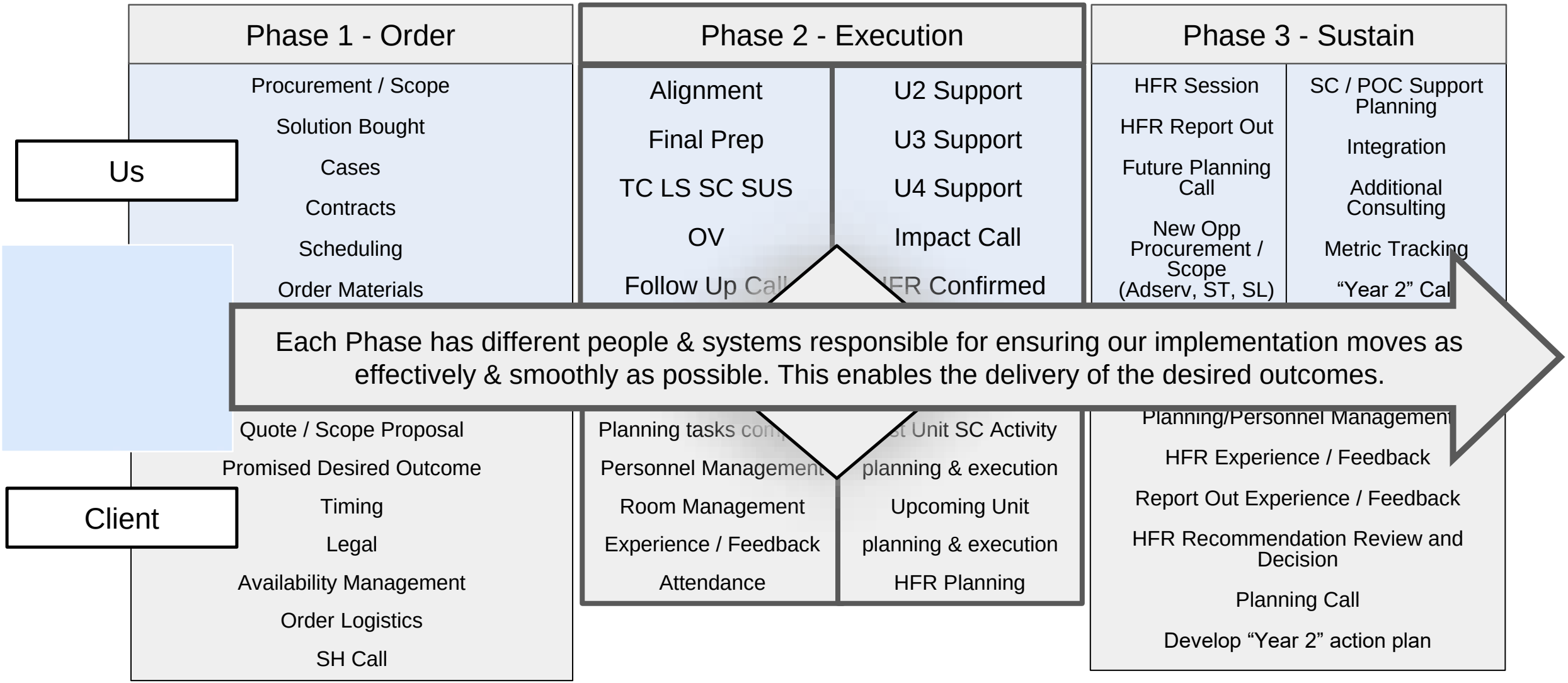
Sell
Deliver
Partnership
Impact
Repeat



Across all teams is our focus

Growth
Capacity
Skill
Resource
Development
Change

Track 2 - A Tail To Remember - The Experience



Track 3 - What A Great Boat - The Pledge

No-Blame Mindset

Acknowledge habituation and autopilot.

We will be kind with people & brutal on systems.

Fresh Eyes

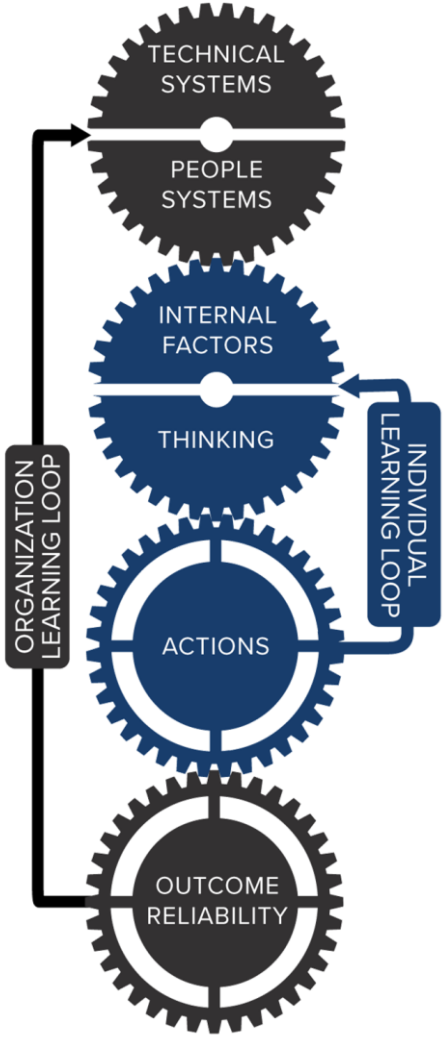
Look at hazards and risks in new ways.

New team with complimentary experience & expertise

Systems & Data

Learn from reporting, team input and analysis.

Deliberate systems, tools and responsibilities to not only manage our OLL but enable action.



Trust & Engagement

Engage coworkers with open communication.

The strength of the wolf is the pack and the strength of the pack is the wolf

Personal Commitment

Demonstrate that you care about keeping your people safe.

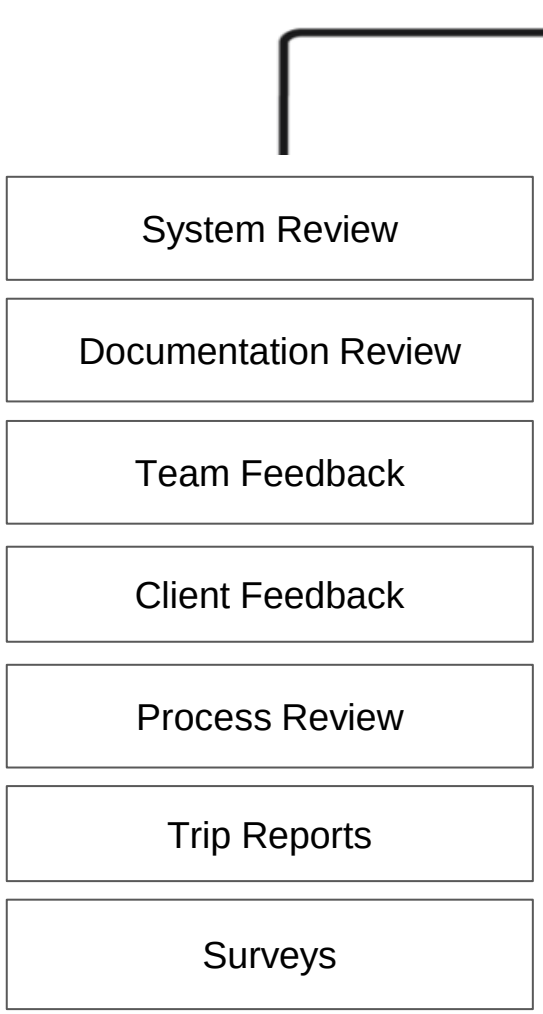
Our outcomes will only be as good as our systems and our people's ability to thrive within them

Active Leadership

Inspire action through what you do and say.

Our team will be the model.

Track 3 - What A Great Boat - The Directions



1 Capture Existing Process

Tasks, ownership, and sequencing are not consistently understood across teams

A single aligned view of 'what happens when' is the foundational next step

Identify friction points and remove complexity

2 Robust Communication Strategy

Gaps at transition points — especially post-sale — are the highest-risk moments

Tools and meeting structures need to carry alignment, not just information

Internal team clarity directly shapes the client experience

3 Structure & Clarity

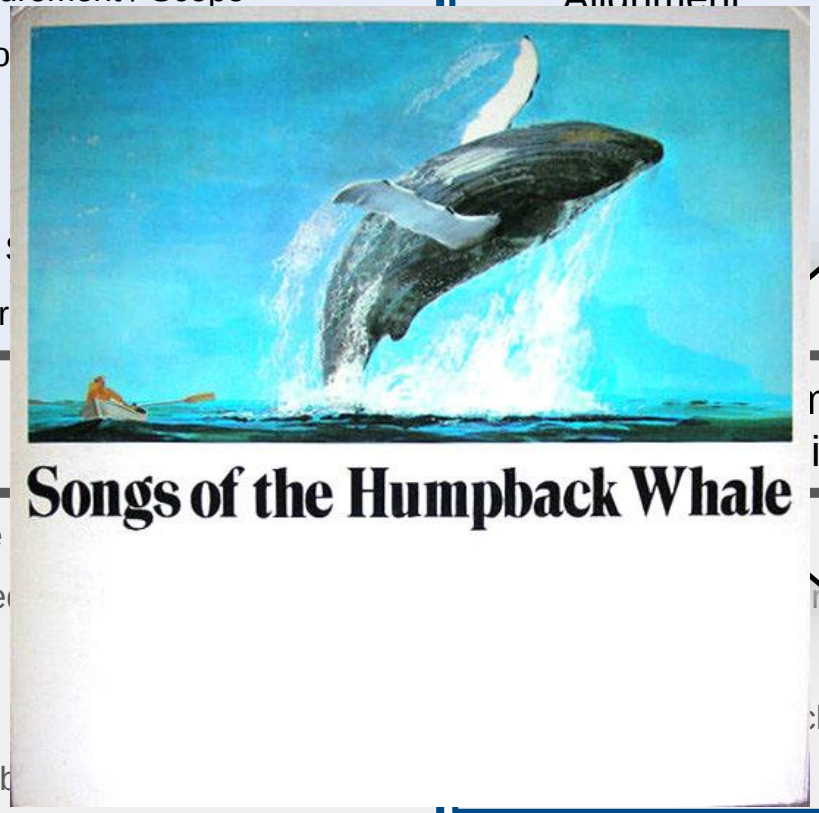
Clear team structures that support collaboration and unified client support not individual silos

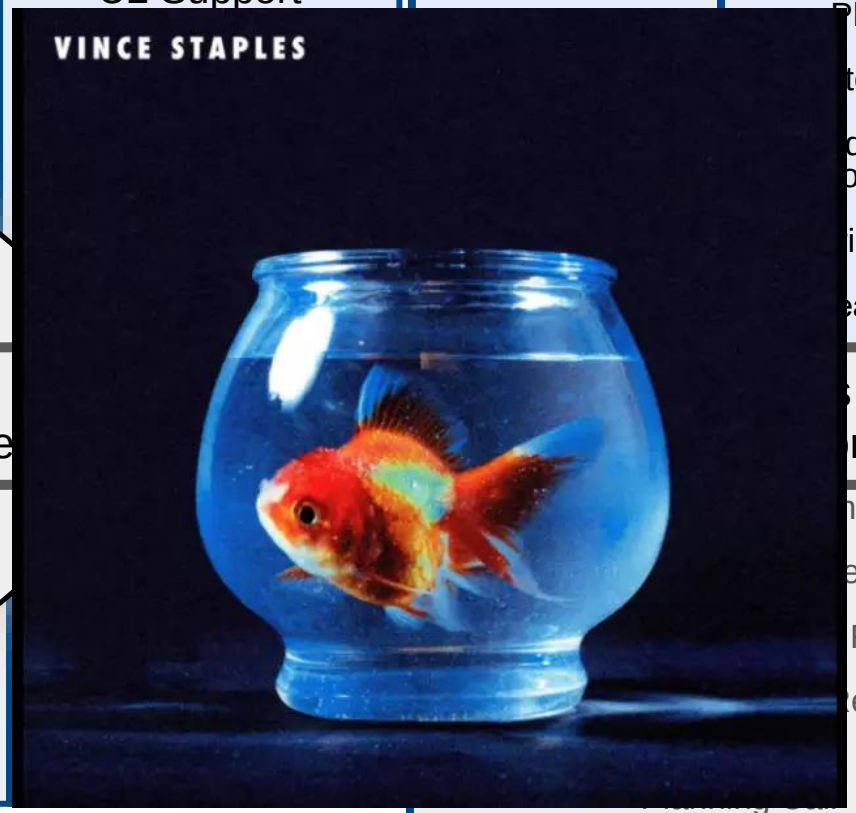
Process must flex for custom work and existing client relationships but with greater team clarity

Making life easier — improving climate factors, supportive environment

Impact

	Phase 1 - Order	Phase 2 - Execution	Phase 3 - Sustain
Us	Procurement / Scope So Or	Alignment U2 Support ns ive	HFR Session SC / POC Support Planning tegration dditional onsulting ic Tracking ear 2” Ca s as r.
Client	Quote Promise Availab Order Logistics SH Call	ck	nagemer edback Feedback eview and Develop “Year 2” action plan





What's your Implementation Story?

SAFESTART NOW ①

IMPLEMENTATION STORY
STORY CARD

Summary

Stages / States
Challenges / Growth

Elements:

- ☐ Include What Stage(s)
- ☐ What States
- ☐ Describe the Critical Errors
- ☐ Growth Opportunity

Name ②

Story Card

What were the states and errors?

STATES

- ☐ Rushing
- ☐ Frustration
- ☐ Fatigue
- ☐ Complacency



ERRORS

- ☐ Planning / Scoping
- ☐ Communication / Info
- ☐ Client Expectations
- ☐ Support Strategy



The four **states** can cause or contribute to four **critical errors**, which increase the risk of injury.

SAFESTART®

Group Activity
Table groups take a few minutes to think and write your summary.

Be ready to tell the story to our group explaining the element.

The group will select 1 person to present to the larger group.

No Blame, Names, or Shoulding.

What's your Implementation Story?

SAFESTART®

SAFESTART® NOW ①

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Pete ②

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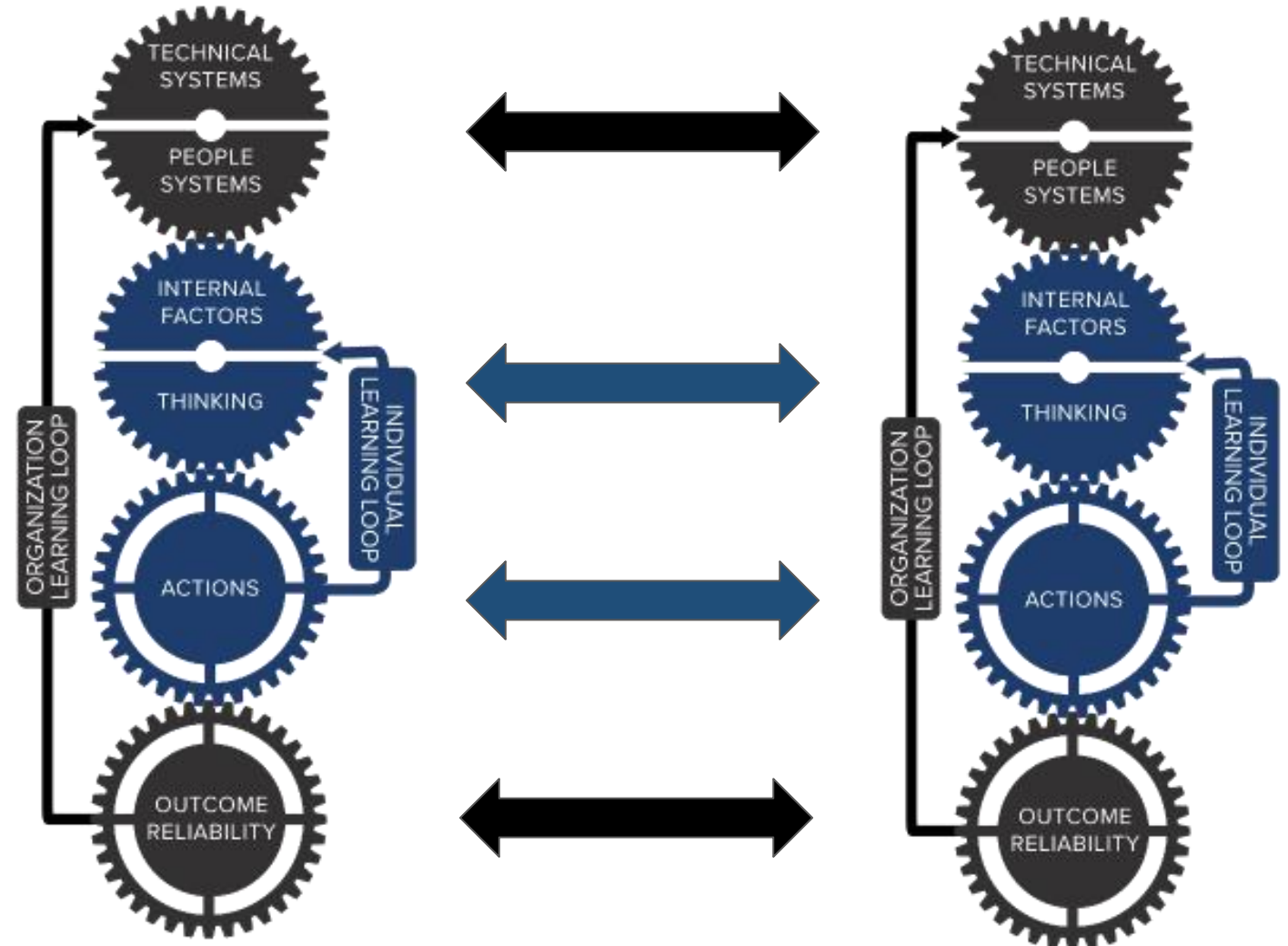
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What's your Implementation Story?



Client | **SafeStart**

What's your Implementation Story?

SAFESTART®

SAFESTART® NOW ①

IMPLEMENTATION STORY
STORY CARD

Summary

Stages / States
Challenges / Growth

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Name ②

Story Card

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STATES

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ERRORS

- ☐ Planning / Scoping
- ☐ Communication / Info
- ☐ Client Expectations
- ☐ Support Strategy



The four **states** can cause or contribute to four **critical errors**, which increase the risk of injury.

Think of a Story where none of the challenges were present. Or were mitigated so well the impact was not felt.

Whats your Implementation Story?

SAFESTART®

SAFESTART® NOW 1

IMPLEMENTATION STORY
STORY CARD

Summary

Stages / States
Challenges / Growth

Elements:

- ☐ Include What Stage(s)
- ☐ What States
- ☐ Describe the Critical Errors
- ☐ Growth Opportunity

Summary

Stages / States / Challenges / Growth

Name 2

Story Card

What were the states and errors?

STATES

- ☐ Rushing
- ☐ Frustration
- ☐ Fatigue
- ☐ Complacency



ERRORS

- ☐ Planning / Scoping
- ☐ Communication / Info
- ☐ Client Expectations
- ☐ Support Strategy



The four **states** can cause or contribute to four **critical errors**, which increase the risk of injury.