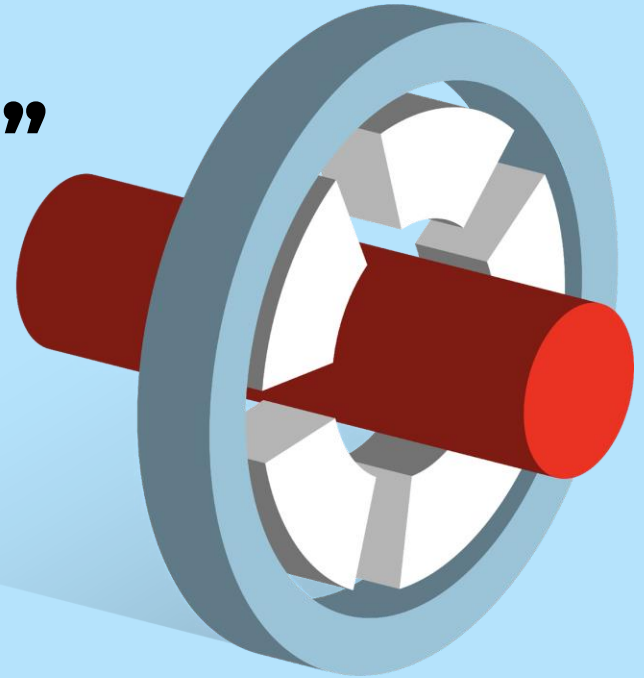




Putting the “I” in “team”

Quality inspections as a team sport

Jake Freivald
Vice President
Fulcrum





Agenda



Jake Freivald

VP, Product Marketing



Goal: Learn about the characteristics of high-performing teams and, knowing them, find pragmatic ways to reduce time and money lost to rework, enhance your organization's reputation, and improve margins.

Discussion topics


- Distinctive characteristics of high-performing teams
- Supports needed for quality inspections at scale
- Continuous improvement using data and metrics

Distinctive characteristics of high-performing teams

Characteristics of high-performing teams

McKinsey & Company

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McKinsey Quarterly

High-performing teams: A timeless leadership topic

June 28, 2017 | Article

By Scott Brinker

Share Print Download Link

CEOs and senior executives can employ proven techniques to create top-team performance.

Classic business characteristics. Team composition (#, skills, attitudes, etc.), dynamics (trust, comms, risk, etc.)

Harvard Business Review

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Collaboration And Teams

5 Things High-Performing Teams Do Differently

by Ron Friedman

October 21, 2021

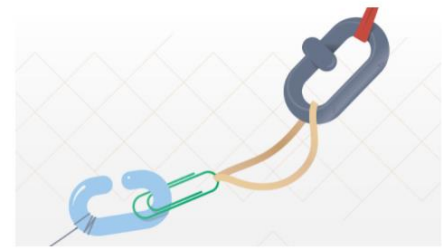


Illustration by Daniel Cronk

Psychological characteristics. Pick up the phone, more strategic meetings, non-work bonding, etc.

Forbes

LEADERSHIP

14 Characteristics Of High-Performing Teams

Expert Panel® Forbes Councils Member
Forbes Human Resources Council
COUNCIL POST | Membership (Fee-Based)

Sep 16, 2020, 01:10pm EDT

f Efficient teams are the hallmark of an industry-leading business. Having a cohesive, high-performing team can set your business apart within your industry and ensure the success of your organization in the long run.

But what makes a team work well toward the same goals to drive your company's growth? There are obvious

A hodgepodge of fourteen different characteristics of high-performing, cohesive units, and suggest ways your teams can achieve the same



Focus on what we can control within our constraints

What we can control

Some things are predetermined

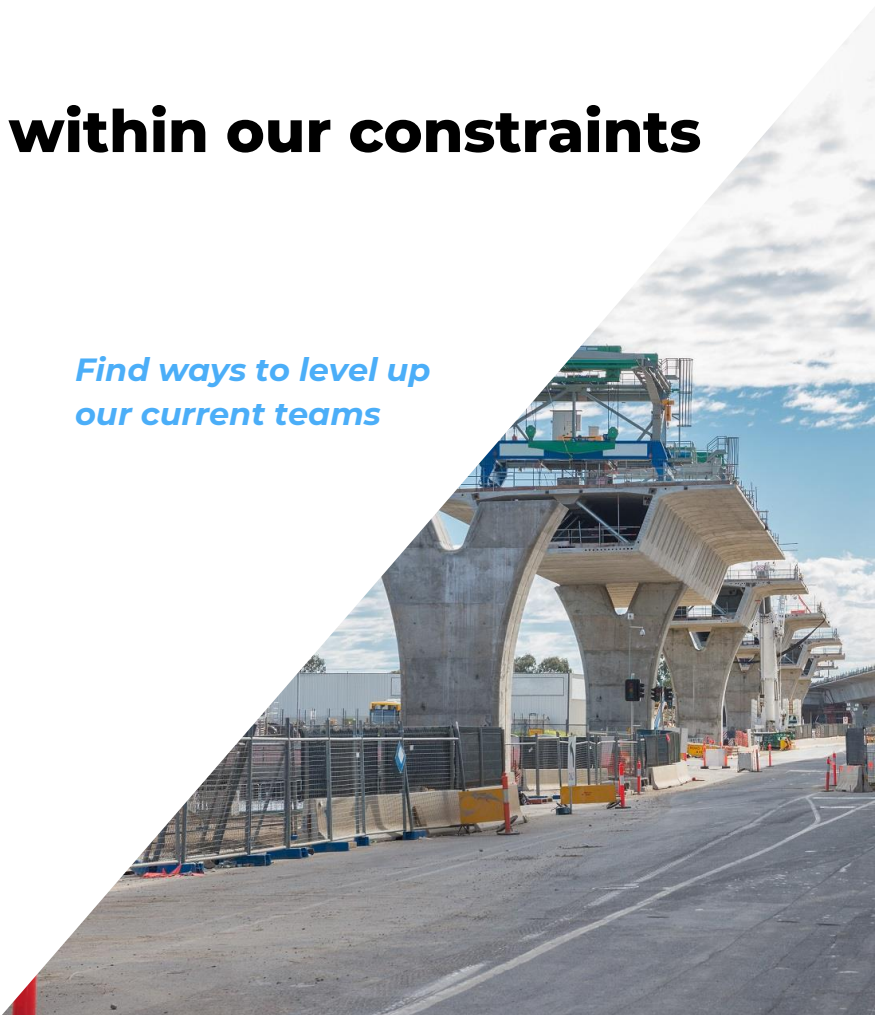
- ▶ Size
- ▶ Aptitudes
- ▶ Attitudes
- ▶ Diversity

Find ways to level up our current teams

Within our constraints

We have unique requirements

Biggest: We're required to maintain a low-risk profile



Supports needed for quality inspections at scale

What characteristics should we focus on? Set 1



Personal excellence

If we can't force personal excellence, ensure everyone knows what an excellent job looks like and how to achieve it.

Get the team's endorphins running when they do well.



Alignment

Show everyone knows how the excellent job they do drives the team, division, and company missions forward.

Get everyone pulling the rope in the same direction.



Transparency

Make sure everyone knows how the excellent job they do stacks up against each other and industry norms.

Get everyone looking at the same quality data



Notice how much *excellence*
depends on *knowledge*



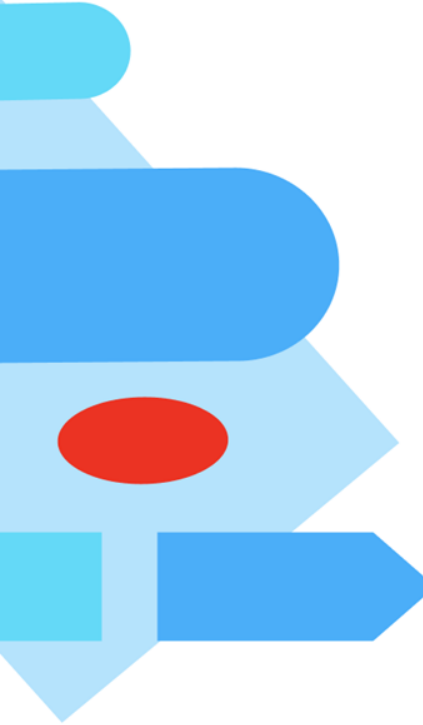
Training is critical*

Do not underestimate the value of training...


...but don't overestimate the challenges, either.

- It's costly
- It keeps experienced people in the office
- Knowledge retention by trainees is low...
- ...so it often lacks nuance
- High turnover means waste
- Trainers leave





Training provides important,
but limited, value for increasing
team consistency, quality,
and productivity



**Sidebar:
Knowledge through checklists**



Checklists seem lowly and simplistic, but they help fill in for the gaps in our brains and between our brains.... Designed well, the results can be extraordinary.

Atul Gawande

Surgeon and author of *The Checklist Manifesto*

Astonishing results from Dr. Pronovost's "stupid little checklist"



66%

drop in average
infection rates in
Michigan ICUs



90%

of ICUs nationwide
had worse scores
than MI's *average*



175M

dollar reduction in
infection-related
costs in 18 months



1500

Lives Saved

Digitization required to do all of this at scale

Where is your knowledge base?

- Training
- Manuals
- Clipboards

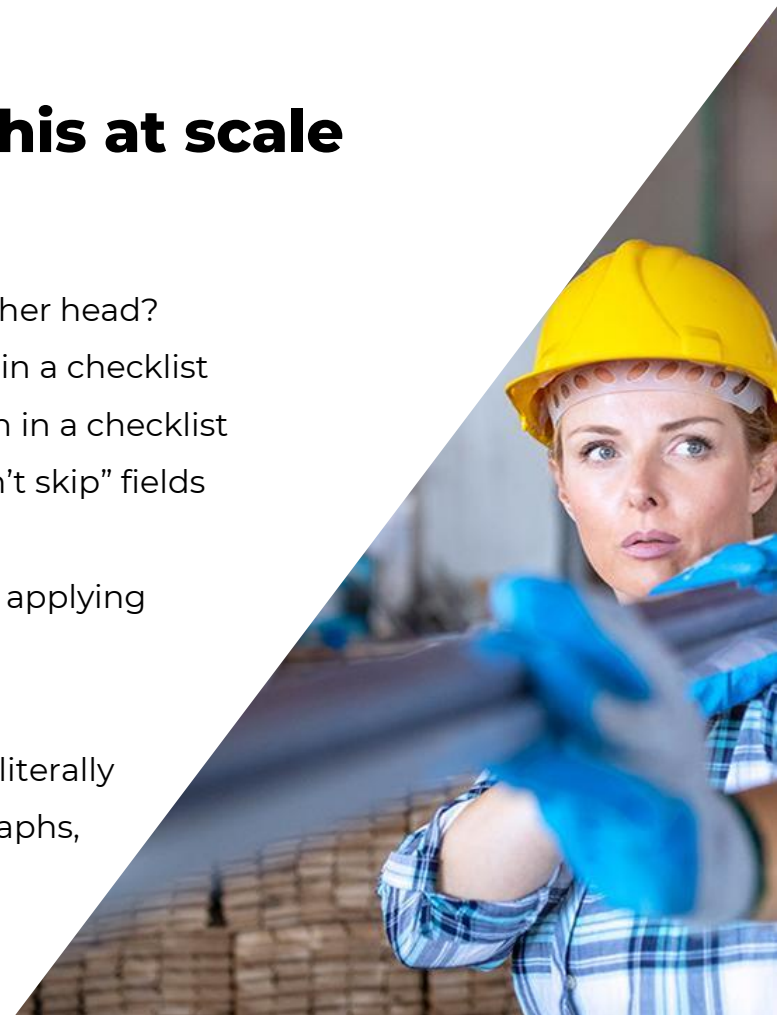
How do you implant it into her head?

- SOP with embedded QA in a checklist
- Quality control inspection in a checklist
- Conditionals, visuals, “can’t skip” fields

...all needed in real time, across sites, with virtual mentorship, and applying transparency. You simply can’t do that on paper.



In addition, for alignment and transparency we need literally to see how everyone is doing – dashboards, charts, graphs, metrics (a la those “X days since last incident” signs)



Polling question

Steer me: Do you want to know why the cloud is as important as digitization?

Why the cloud matters



Clever phrase, but it's a bit like saying that that a bank is just someone else's mattress.

(And software as a service matters, too.)

Back to characteristics of teams

What characteristics should we focus on? Set 2



Adaptability

What processes enable us to change in tandem, appropriately, to better achieve our quality and other goals?



Mentoring

What processes ensure that (a) institutional knowledge remains within the organization and (b) newer inspectors become more secure in their skin?



Pride and recognition

What processes ensure that people are known for the great work that they do – and that everyone knows they deserve it?

These also require knowledge, but focus on how teams acquire, adapt, and leverage that knowledge over time.

In all of these cases, the data must flow

Everything discussed so far requires multidirectional data flows, sometimes in real time

- Inspector to supervisor / mentor and vice versa (supervision, advice, quality posture: “quality” stuff)
- Experienced staff to checklist maintainer (showing how we need to improve situationally)
- Novice staff to checklist maintainer (showing how we need to improve ease of use)
- Inspectors to team leaders and vice versa (tasking and issues: “management” stuff)
- Stakeholders to team leaders (Alignment: Why is quality important, e.g., landing more contracts, reduced money lost to rework, keeping to schedule)
- Team leaders to stakeholders (Fulfillment: How are we doing, what is quality posture, what can you tell clients/prospects/insurers, etc.)

Continuous improvement using data and metrics

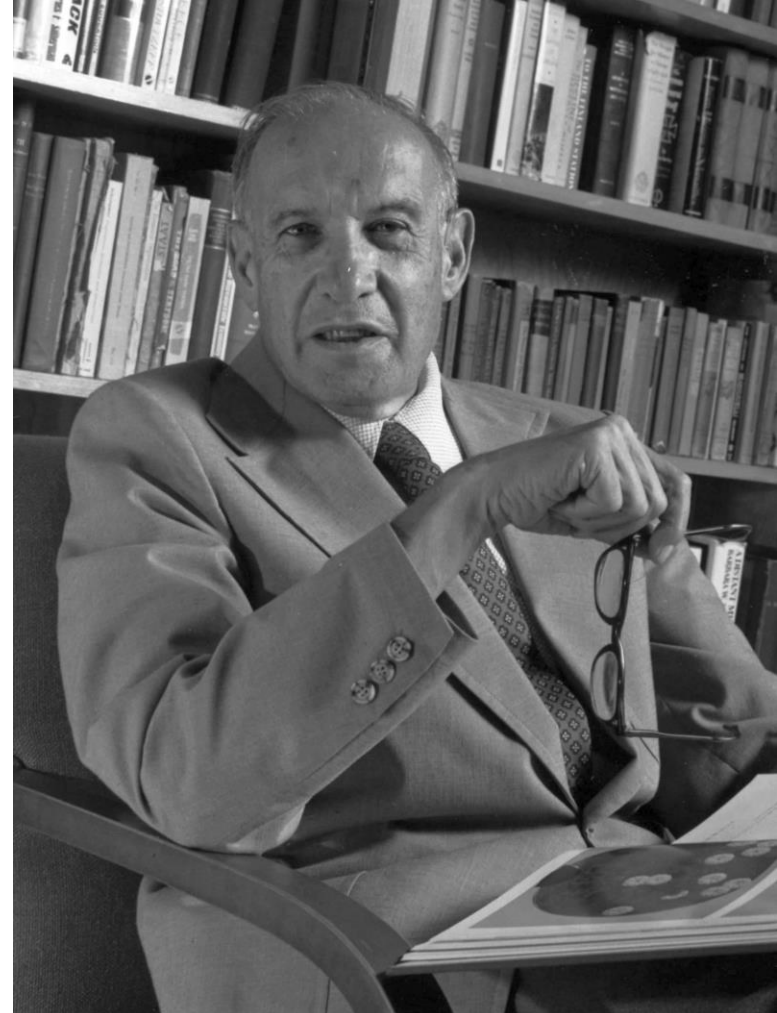
Improvement requires metrics, which requires data

What metrics?

- Peter Drucker: “You get what you measure.” So think about what you need, and start to measure that.
- Be careful of intermediate steps. Focus on real reasons.
- E.g., Punishing quality issue reports teaches people not to report quality issues.

Suggested types of metrics:

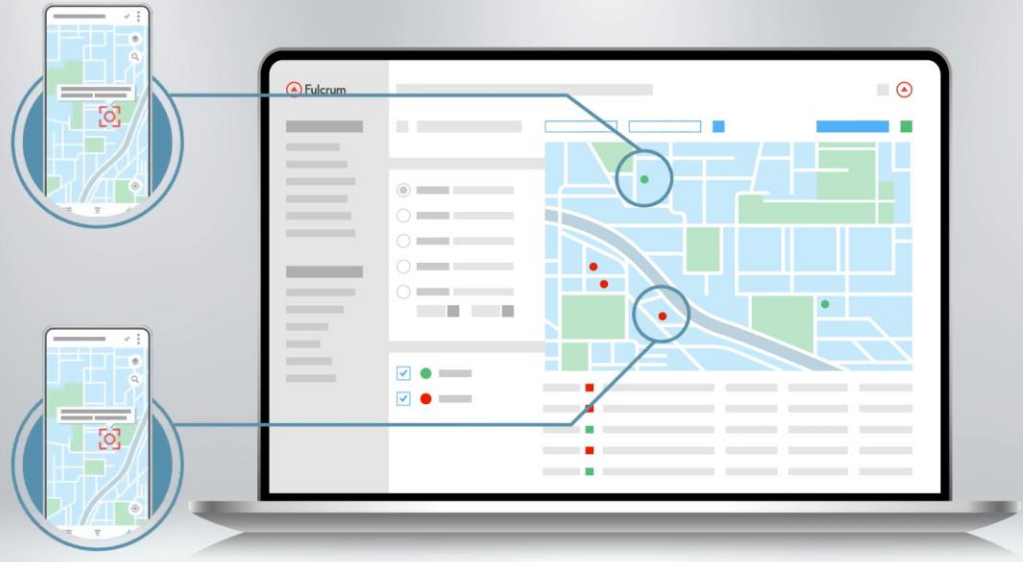
- Quality performance: Remediation time/cost, rework material usage, calendar days lost, person-days lost
- Inspection performance: Inspection time/cost, time workers wait for inspection completion, quality problems found post-inspection



About Fulcrum



Automating field inspection management



- Drive intelligent automation to maximize **field team performance and agility**
- Harness **the value of location** for mobile teams
- Ensure **process rigor and compliance** at scale
- Create **real-time visibility** into inspection performance across inspectors, teams, and stakeholders
- **Digitally transform field-based inspections** for safety, quality, & maintenance



Automating field inspection management

The Fulcrum platform

Fulcrum provides a SaaS-based **Field Inspection Management** platform that

- digitizes inspection processes,
- provides intelligent automation for inspection teams, and
- delivers data-driven reporting and analytics

to drive safer and higher-quality outcomes.

Example: Tasks

Edit Task

Apartment / Suite

City
Huntington Station

County
Suffolk

State
NY

Postal Code
11746

Country
USA

Work Notes
Stop Falls From Heights safety checks

Checklist (0 of 3 items completed)

Assigned
Jake Freivald (jake.freivald@spatialnetworks.com)

Project

CANCEL SUBMIT

15:44

Overview

Tasks

Search

Assigned to me Project

Low Priority Apr 22, 2022

Metal Framing Quality Inspection
Carlsbad I-5 Improvements

Assigned In progress

Medium Priority Mar 30, 2022

Tool Box Talk
Carlsbad I-5 Improvements

Assigned complete

Critical Priority (OVERDUE) Feb 22, 2022

Replace HVAC Unit
Disneyland Maintenance

Fulcrum

Tasks

Search Date range: All Time ADD FILTER

5 In Progress or Open 3 Due This Week 4 Overdue

Title	Due Date	Assigned To	Priority	Status	Project
Scaffolding Safety Inspection	Feb. 22, 2022	Coleman McCormick	High	Open	Carlsbad I-5 Improvements
Fix Light Post at Disneyland Shuttle Stop	Feb. 21, 2022	Scott Hegrenes	Low	In Progress	Lake Elsinor Parks
Metal Framing Quality Inspection	Feb. 24, 2022	Scott Hegrenes	High	Open	No Project
Replace silt fence on north property line	Feb. 23, 2022	Coleman McCormick	High	Open	Carlsbad I-5 Improvements
Repair HVAC Unit	Feb. 18, 2022	John Nelson	Medium	Complete	No Project
Tool Box Talk	Feb. 15, 2022	Sara Safety	Medium	Complete	No Project
Repair Drywall	Feb. 8, 2022	Fred Foreman	Medium	Complete	No Project

Team leader creates tasks

Inspector completes tasks

Team leader manages the team's tasks

Example: Issues

Report Issue

Project

Status
Needs Resolution


Title
Exposed electrical box

Description
There are crazy wire sticking out of this electrical box

Issue Type
Hazard

Priority
Critical

Location



CANCEL SUBMIT



Fulcrum

Home
Issues
Tasks
Apps

Setup
CONFIGURATION
Imports
Exports
Projects
Issue Types

APP SETUP
Map Layers
Choice Lists
Classification Sets

ORGANIZATION
Member Profile
Organization Profile
Billing
Members
Roles
API
Webhooks
Audit Logs

Issues

Global Search
Filter Issues

Date Filter: All Time + ADD FILTER

35 Urgent Items

81 Issue Count by Type

- 0 Incident(s)
- 0 Hazards
- 0 Near Misses
- 5 Other

70 Needs Resolution

Title	Type	Priority	Status	Project	Reported By	Reported On	Tasks	Photos
3 people in a sensitive area			NEEDS RESOLUTION		Trey Hyde	March 18th 2022, 1:51 pm		
3 people in a sensitive area			NEEDS RESOLUTION		Trey Hyde	March 18th 2022, 1:35 pm		
2 people in a sensitive area			NEEDS RESOLUTION		Trey Hyde	March 17th 2022, 8:34 pm		
test 4	Observation		RESOLVED		Mac Fernandez	March 15th 2022, 11:38 am		
test 3	Observation		APPROVED		Mac Fernandez	March 15th 2022, 11:38 am		
test 2	Observation		NO RESOLUTION NEEDED		Mac Fernandez	March 15th 2022, 11:37 am		
Test 1	Observation		REJECTED		Mac Fernandez	March 15th 2022, 11:36 am		
Post Captcha Removal Test	Observation		NEEDS RESOLUTION		Issue Capture - Public User	March 14th 2022, 5:43 pm		
External Link Created		No action required	NEEDS RESOLUTION		Issue Capture - Public User	March 11th 2022, 4:18 pm		
			NFFDS			February 28th 2022		

Fulcrum user creates issue

Team leader manages issue resolutions

Example: Issues



Report Issue

Project

Status
Needs Resolution


Title
Exposed electrical box

Description
There are crazy wire sticking out of this electrical box

Issue Type
Hazard

Priority
Critical

Location



CANCEL SUBMIT

Sees issue,
scans QR
code

Reports issue *without*
downloading Fulcrum

Fulcrum

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Issues
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Apps

Setup
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Imports
Exports
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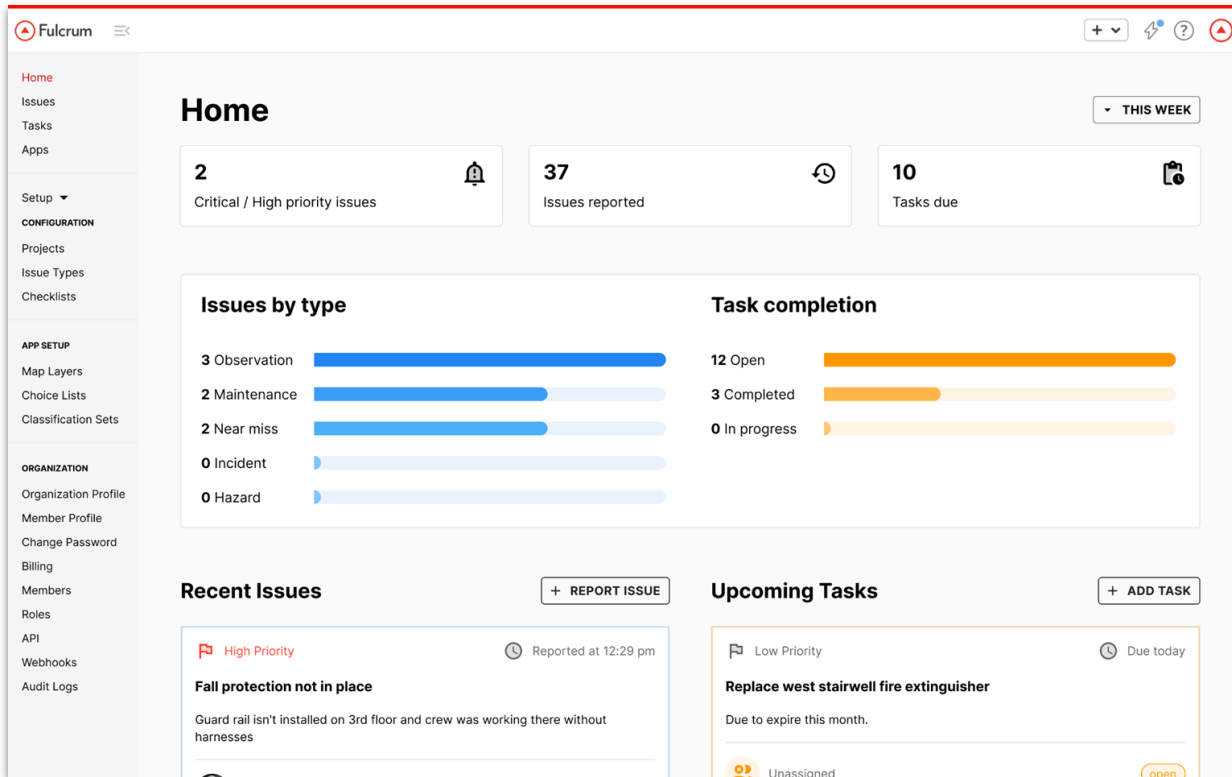
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			NFDS			February 28th 2022		

Team leader manages issue resolutions

Try it!



Example: Out-of-the-box dashboards



Provides real-time, consolidated view across all inspection teams on a single pane of glass

Thank you for listening! Questions?

Try it free ▶

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Automating field inspection management

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