Getting Started with Electronic Feedback

A Construction Owners Guide to Great Projects

Pause for a moment and think back to *the greatest project you ever worked on*.

What adjectives come to mind when describing the project? Which come to mind when explaining *how* you achieved that "greatest project ever" outcome?

Odds are, you'll use words like collaborative, communication, fun, teamwork, or innovative. Great outcomes require a complex orchestration of internal and external stakeholders coming together, understanding each other, and working jointly towards a common goal. Great teams build their foundation on strong relationships. It's those relationships that enable the adjectives like fun, teamwork, and innovative to thrive.

Project teams not built on strong relationships miss deadlines, blow budgets, and blame, blame, blame. You've been on more of those projects that you'd like to admit. Aside from the practical concerns of budget, schedule, and risk, projects like that exhaust your energy, rob you of sleep, and keep you from doing the parts of your job you really love.

In 2013, the Smithsonian Institution's Office of Planning, Design and Construction, responsible for approximately $300MM in annual capital improvements, set out to explore why some projects thrived while others struggled. Smithsonian Institution (SI) initially hypothesized improving performance from their architects and engineers (AEs) would drive more consistent project outcomes. SI began a project-based feedback program to evaluate the AEs. They soon found great projects require "high-frequency, high-fidelity" conversation between all stakeholders – not just the AEs - in order to bring about more collaborative, positive outcomes.

SI implemented a near real-time, milestone-driven feedback process engaging internal facilities and project management staff, Smithsonian museum operators/users, and the architectural/engineering consultants. They gave all parties the chance to vocalize their sentiments clearly, and initiate conversations when and where needed. SI's teams are becoming more collaborative and finding more project success.

Why Electronic Feedback?

Smithsonian needed a repeatable process that provided accountability and enabled action. Electronic feedback processes integrated with their project delivery plan became a critical component of their ongoing program. Phone and in-person conversations continued to be important. However, unlike those analogue interactions, electronic feedback let them scale their listening across an enterprise efficiently while also providing objectivity, accountability, and metrics available in no other way.

Electronic feedback shouldn't be your ONLY method of polling stakeholders for their sentiments, but electronic surveys are quick, effective, and provide measurable metrics. For these reasons, SI chose to make electronic surveys the foundation of their improvement initiative.

Before you begin, recognize that an effective electronic survey only provides value when paired with a commitment to follow-up to any items raised. The Smithsonian team configured alerts on their feedback program such that a leader is flagged anytime someone records a low score. The leader then meets with the respondent to understand their specific concern in more detail. The leader will usually follow that with a second meeting or conversation with all impacted project participants to discuss improvement strategies, and design a more successful outcome for everyone.

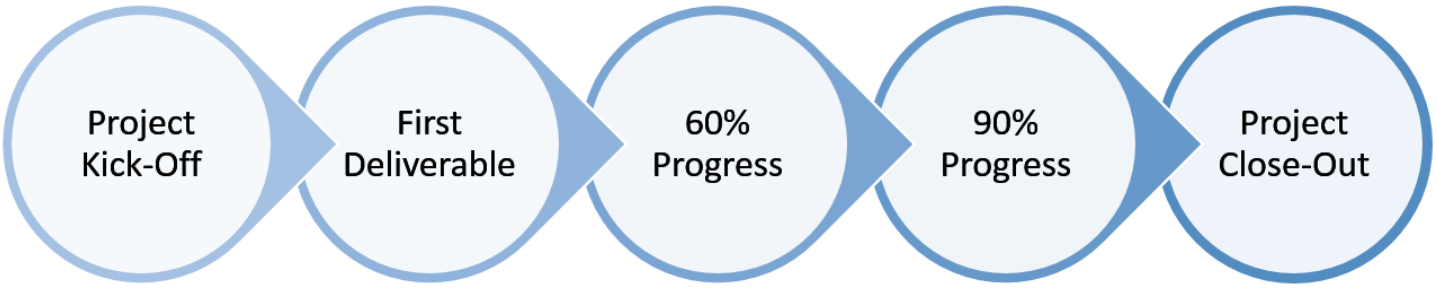
This guide provides a framework for implementing and executing an active, ongoing, project-based electronic feedback process designed to increase the likelihood of a "best project ever" outcome, every time. Creating a feedback plan requires knowing when to ask, who should be involved, what to ask, laying out an implementation strategy, creating a follow-up plan, and aggregating results to explore systemic improvements and trends.

When to Ask for Feedback

Don't wait until the project is over. Few opportunities exist to change the outcome at that point. Ask early. Ask often. Consider the critical moments in a project, and develop check-in points aligned with those. Your projects will vary in size and duration, and your plan should be flexible enough to address projects lasting a few weeks and ones lasting several years. We have found survey response rates remain high (40% plus) when recipients are asked as often as every 6-8 weeks, especially if you communicate the feedback checkpoints to your team in advance. Discuss with them how the feedback will help improve the project for everyone. Common measurement points may include:

- **Project Kick-off** – focus on discovering if the team has successfully identified a successful path toward success. If anyone feels misaligned, the sooner you discover it, the less time you waste going down the wrong path.
- **First Deliverable** – now that you've received the first product from the project team, you have a "thing" to poke at. Assess the process used to generate that deliverable. What worked well? What could be improved?
- **60% Progress** – many project teams define deliverables or milestones by percent complete; you may define yours with phrases like "design documents" or "dried-in." Whichever major work breakdown structure works for you, consider developing a set of questions to support evaluating that phase of work.
- **90% Progress** – just before the project is over, but not quite done, you have a great opportunity to capture any lingering concerns and still have time to adapt and improve. Think about the last responsible moment you can gather feedback and still have time to react.
- **Project Completion** – while you cannot change much after the project is over, if you and the team have done well sharing feedback and reacting when needed, the Project Completion survey allows the entire team to reflect, pass along kudos for successes, and orient the mindset for "what's next." Don't underestimate the power of giving people the chance to say "well done" or "thank you." Ending the project with captured positive sentiment cements in everyone's memory the real success achieved by the project team.

If your project has multiple major components, such as design followed by construction, consider having a series



of feedback exchanges during design, then another during construction. For example, your 90% Progress for the design team may align with a Project Kick-off for the construction team.

Resist the temptation to make the feedback plan too complicated or nuanced. Focus initially on the simplest plan that works for you.

Later in this guide we have included a survey template for Project Kick-off, one for use anytime during the project (Ongoing Project), and another for completion (Project Close-Out). Start with these, and expand as your needs change. The Ongoing Project template may be used multiple times during project execution if needed.

Who Asks, Who Answers?

After identifying when projects hit critical moments worth measuring, consider who to involve in the feedback process. As an owner, you might group stakeholders into four categories: procurement, operators, users, and consultants.

- ❑ **Procurement -** maintains responsibility for helping internal clients (operators) acquire, commission, and maintain capital projects. Procurement may act as an owner's representative, and may also include project management, design/construction management, and other critical services. "The Office of the Architect" is an example in a higher education scenario.
- ❑ **Operators** - internal clients who have developed a need and requested procurement's assistance. Operators often define the program requirements and stay engaged throughout the project to assure the final project meets their usability needs. In the higher education example, the operator might be the dean of Chemistry who needs new lab space.
- ❑ **Users** - the operators' clients; these are the people who occupy or use the project constructed. You may have primary and secondary users, such as professors (primary) and students (secondary). In a hospital, users include doctors & nurses (primary) and patients & visitors (secondary).
- ❑ **Consultants** - the team of professionals hired to help you plan, design, and construct the capital project. Consultants include architects, engineers, contractors, construction managers, and individual trade partners. You likely will have direct consultants (primes), who then have their own sub-consultants.

Each of these roles has a potential voice to help improve the design, construction, and delivery of your capital project.

Beyond understanding who might have feedback to give, you must decide who will be taking primary responsibility for the feedback collected. Typically, the person responsible for acting on feedback collected should be the one asking for the feedback. One way to plan the feedback collection is to map the value chain. When you trace flow of the value, you trace the feedback flow. A sub-consulting engineer creates value for a prime architect; who creates value for the procurement group; who creates value for the operator; who creates value for the users. Feedback requests usually are sent in the same direction as the value creation (e.g., vendor to client, at each step).

If you are in the middle of the value chain (perhaps you are in the procurement group for an owner agency), you may not be able to depend on your AECs asking for your feedback. Therefore, you may considering gathering that feedback yourself and publishing it to them. In this situation, consider a multi-pronged approach to soliciting feedback:

- ❑ **From your immediate client** (the operators, or people requesting your service) regarding the overall project progress and performance. This reflects on both your internal organization, your consultants, and your management of those consultants. Gather feedback from this group throughout the project.
- ❑ **From yourself and your internal procurement team**. This self-assessment reflects mostly on the performance of the consultants you've hired to help develop and deliver the project. Gather feedback from this group throughout the project and discuss it with your consultants.
- ❑ **From your consultants**. Asking how well you are doing as a client gives your consultants the chance to help you improve. The easier you are to serve, generally the better, faster, and cheaper they can deliver their services. Plus, if you begin sharing the results with

them later, demonstrating a willingness to review your role in the project's success shows you are fully committed to improving, not simply blaming problems on the consultant. The most critical feedback collection occurs toward the beginning of the project.

- ❑ **From Primary Users**: consider asking for feedback from anyone who helped develop the program during the design phase. Also consider asking for feedback from those impacted by construction if your project involves a working facility.
- ❑ **From Secondary Users** likely don't have a large voice in the development and delivery of the project, but may have great insights following completion. If your organization doesn't interact with the secondary users, you may coach the operator or primary users to solicit relevant feedback after completion.

What to Ask

Writing effective questions takes skill and careful thought. If you'd like a complete primer on crafting great questions, request our guide: "Asking Great Questions to get Great Results." Here are a few quick tips:

- ❑ **Focus on the Process**. People don't like being criticized. Most don't like to be critical. Ask questions about the process people use, rather than the people themselves. This will provide candid, helpful insights and critiques.
- ❑ **Keep it simple**. No more than 6-8 questions. Fewer than 12 words per question. If you see the word "and" you have two questions. Break them apart. People don't read carefully. The question is just a prompt to get them thinking – nothing more.
- ❑ **Don't ask if you can't act**. Asking for feedback implies a promise to respond. If

Sample Feedback Questionnaires

Project Kick-Off

1. How well did we explain the process of beginning the project?
2. How responsive were we to your questions and concerns?
3. How accurately did our process identify your priorities and preferences?
4. How well did our process identify the overall schedule issues and/or deadlines?
5. How well does our process communicate expectations about the project budget?
6. How well have we inspired the project team to achieve great things?
7. Please provide any additional feedback.

Ongoing Project

1. How well does our team provide the services needed to help you meet your goals?
2. How well does our team convey information in a timely and effective manner?
3. How well does our team understand and incorporate your preferences into the work performed?
4. How accurately do we reflect your decisions and preferences into the work produced?
5. How well does our team do its part to maintain your schedules?
6. How well does our process manage budget considerations?
7. How easy are our invoices to understand and approve?
8. Please provide any additional feedback.

Project Close-Out

1. Evaluate our level of service and support throughout the duration of the project.
2. How well did our team handle any questions, needs or concerns that arose during the project?
3. How well did the quality of our services meet your expectations?
4. How well did we provide you with the right deliverables such as project work, reports, and troubleshooting?
5. How well did we support your time line for this project?
6. How well did our services add value to your project?
7. What, if anything, might we have done differently or better to improve our service and value to you?
8. Please provide any additional feedback.

Feedback From a Consultant

1. How well did we fully communicate the expectations for this project?
2. How responsive are we to your questions and concerns?
3. How well do enable you to achieve your goals for the project?
4. How well does our process identify overall scheduling issues and/or deadlines?
5. How well does our incorporate your recommendations without adding unnecessary or unwanted features?
6. How well did the outcome match your expectations for this project?
7. Please provide any additional feedback in the text box below.

you can't change the color of the grass, don't ask if they like green grass.

- ❑ **Ask about common themes**. Develop a few different sets of questions for the different phases and stakeholders you will survey. Identify 6-8 themes that matter and craft questions for those themes on each template. A question about "budget" would be different when asking an operator after a kick-off meeting, versus asking a facilities person at project completion. In both cases, you want to gather insight into the budget theme, but the questions will be asked differently. Common themes include *helpfulness, responsiveness, quality, accuracy, schedule, budget, scope,* and *safety*.
- ❑ **Focus on expectations, not satisfaction**. You cannot control satisfaction, but you can manage expectations and guide performance relative to those expectations. Take two minutes to watch the brief overview of question scale methodology here: https://youtu.be/2AwLFHpeCGU

Creating Accountable Feedback Processes

Designing a great program allows you to start gathering insights. To actually start *asking for feedback* requires an accountable feedback process. Tailor your plan to your specific tools, resources, and people involved.

When your first begin soliciting feedback, some of your staff may be uncertain or anxious. Provide adequate training to communicate your vision for the program. Clearly define the role for each of your staff, and help them realize you are there to support them through the process – especially when any challenging feedback comes in.

Avoid setting any standards for scores, as that may lead to gaming of the system, grade inflation, and worse – avoiding feedback from the places it's most needed. Instead, define clear metrics for participation. Reward and recognize those who most consistently solicit feedback and follow-up to challenging responses.

To help operationalize your program design, identify sources of key project information and clearly define the process and timeline for sending surveys. Here is an example plan:

- ❑ **Identify a source of active projects and statuses.** Perhaps you have an enterprise resource management, project management, or cost accounting system. These often have the "single source of truth" for where activity is happening. Once a month, create a list of projects from your system. Starting out, focus on your top 10 or top 20 projects for inclusion. Go deeper down the list as your program matures.
- ❑ **Compare lists.** Look at the list of surveys sent the previous 60 days and compare it with the list of active projects. Any projects already surveyed may be excluded from surveying this month. Flag those that remain for sending.
- ❑ **Notify the staff members who need to send a survey.** If staff have been surveying on their own, celebrate their commitment to listening. Those who haven't yet followed the process may need a reminder to send. They may also need help. Consider assigning an administrative resource to manage this process and set up/send surveys on behalf of the project manager or responsible party.
- ❑ **One week later, confirm surveys have been sent.** Make sure the process is working, and drive accountability all the way through execution.
- ❑ **Two weeks later, track that follow-up actions are captured**. Asking for feedback implies a promise to respond. It is important that your team is following up. This leads to the next topic. Taking action.

Taking Action

Once you've asked, you are now responsible for closing the loop on any outstanding issues raised.

Most responses will reveal positive sentiments, and only require a thank you or acknowledgement. Do be sure to respond to almost everyone that completed a survey. This is how they know their voice was heard. Except in rare cases, the person who sent the feedback request is usually the person the client expects to perform the follow-up action.

For the instances where a respondent indicated something did *not* meet their expectations (about one in eight respondents, on average), invite that person to a real conversation via phone or, better, a meeting. Discuss the

situation they raised. Don't focus on what happened (which can lead to defensiveness), instead focus on understanding *why the person responded the way they did.* Seeking to understand the other person's "why" demonstrates empathy, and opens the door for real conversation leading to authentic, root-cause solutions.

Some tools may be helpful to make the follow-up process easy and sustainable.

- ❑ **Alerts.** Set up alerts on your system. Unless feedback responses trigger alerts to the right person, at the right time, effective follow-up will be late and unreliable.
- ❑ **Tracking.** To assure respondents' issues are actually resolved, find a way to flag which responses need follow-up, which have follow-up, and what action-items or improvement plans have been developed.
- ❑ **Reporting.** As part of your drive for accountability, you or your leadership team may need reports of common issues, or of outstanding problems left unresolved. Without this information, managing issues to close becomes challenging.

If you find the criticisms coming inbound are focused on internal processes, meet directly with the responding party and discuss.

If you find the criticisms are targeted at an external process (for example, the operator lodges a critique with the architect), meet with the operator first to learn more. Once you have gained a better understanding, share the feedback with the architect, and invite all parties to meet and collaborate on a joint solution.

After developing the solution, document the new process and publish to all parties impacted. Doing so sets new expectations for the team, and shows everyone that you all, together, are able to collaborate and improve.

Asking commits you to following-up. Take action!

Aggregating Results

A great feedback process creates many incremental improvements and surfaces individual successes and challenges. Over time, you will develop a library of common themes, trends, and insights. This data leads to broader organizational opportunities.

Examples of systemic insights include:

- ❑ Identifying which consultants perform best on certain types of projects
- ❑ Identifying which consultants work best with other consultants or stakeholders
- ❑ Identifying which consultants might be best suited for a project requiring exceptional performance in one area (such as budget management)
- ❑ Identifying themes that need attention organization-ally (such as inconsistent responsiveness)
- ❑ Identifying potential areas for risk or failure
- ❑ Identifying the most common failures and developing training or processes to avoid
- ❑ Identifying the most common positive surprises, and developing training or processes to standardize the discovered excellence
- ❑ Identifying areas of over-delivery that may be dialed back, reducing waste and saving time

Summarizing and Next Steps

Implementing a high-quality feedback process doesn't have to be hard. And, with careful planning and attending to a few best practices, you can find great success gathering insights and applying them to improve your organization. When all stakeholders have a voice, feel they are heard, collaborate freely, and work together for mutual success, everyone walks away from the project thinking "*this was the best project ever!*"

- ❑ Ask for feedback early and often
- ❑ Involve key stakeholders in the process
- ❑ Design surveys targeted for each phase/relationship
- ❑ Write questions that are simple and concise
- ❑ Measure processes not people
- ❑ Ask about expectations rather than satisfaction
- ❑ Create accountability to ask
- ❑ Enable alerting to act
- ❑ Create accountability to follow-up
- ❑ Practice empathy when solving problems
- ❑ Track your results and tackle systemic issues

If you would like to speak with someone who helps design and implement feedback programs, reach out to Client Savvy at answers@clientsavvy.com or 919-573-1730.