



On Boarding Built Today but
Designed for the Future

Seniye Groff and Tim Sissel
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Inc.

Session Objectives

- Review process for identifying gaps
- Summarize plan development
- Discuss solutions
- Summarize how lessons can be applied to individual scenarios



Background

- Fortis Construction Inc. in business for 14 years
- Serves Oregon/SW Washington markets + worldwide (data centers)
- Core markets: Education, Commercial, Healthcare and Data Centers
- 210+ professional staff
- Rapid growth, fast-paced environment
- Very strong culture
- On boarding consisted of completing new hire paperwork, getting computer and then going to the site
- Tribal knowledge and “figuring it out” was standard operating procedure



Purpose

01

WE MAKE AN

IMPACT

THAT'S WHY WE EXIST.

Core Values

02

This enterprise is built on these fundamental, inviolable values and beliefs:

RELATIONSHIPS

Life is too short. We want to work with and for people we respect, trust and care about.

PIONEERING

We will continuously seek out challenges and push boundaries with creative ideas and solutions.

WINNING

We have an intense will to win. We will go longer, work harder, and give more than anyone else.

PRIDE

We are driven by work ethic and craftsmanship. We do our best work even if no one is looking.

Manifesto

03

Developed by its employees, these thoughts are intended to give more context to what's at the core of this company and what's expected from its people.

Our culture is the magic that unifies us. Experience the joy of shared success. Curiosity is a prerequisite: Push the button... see what happens. Good isn't good enough. Great is the new normal. Enjoy the richness of friendships. Appreciate what surrounds you. Challenge. Be intentional. Teach someone something every day. Have fun building stuff. Grow. Listen. Check your ego at the door. Be humble. Build lasting impressions.

ENVISIONED FUTURE

We will build something extraordinary on every continent in the world.

We work anywhere and everywhere for those who pursue greatness.

We are equal parts builders and business people.

We seek unexpected answers that enable the future.

We practice and perfect sound fundamentals, but our playbook prizes ingenuity.

We deliver an experience that draws customers to us with their most coveted projects.

We train like champion athletes, and a role on this team sacrifices stardom.

Our culture is alive and intentionally different.

We're heroes to each other and our families.

This is a place that curates smart, driven professionals into strong leaders.

Developing a Plan

- Created all employee survey (50% return rate)
- Reviewed all existing materials
- Met with management team
- Created an on boarding advisory group
- Researched industry think tanks and resources
- Contacted existing Fortis vendors



Employee Survey Insights

“There are too many invites to events that are not personally applicable. It becomes too easy to ignore events when you receive such a large volume of invitations.”

“Better define the required audience and topics to be covered.”

“Discussions are great and beneficial in large group settings. Hands-on instruction should be handled in smaller classes.”



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Content Development

- Force rank course needs
- Create consistent look and feel
- Hire team to develop
- Build curriculum maps for each role
- Assemble advisory group comprised of each role represented



Content Delivery and Storage

- Simplify tool by eliminating complex Learning Management System (Cornerstone)
- Make training content easy to find
- Explore LMS plug-in tied to SharePoint



Conversation Log

Date	Notes
7/1/17	Met with Tom (my primary reviewer) and he suggested I attend XYZ seminar. He also gave me feedback about a recent deadline I missed with the client. I brainstormed ideas on how it will not happen again.
9/1/17	Completed my time management class. I consistently use the priority ABC system and it is working! Jerry gave me feedback during this meeting about how much improved I am on my time management. He also suggested I add a new goal to my learning plan: take Presentation Skills offered by Matt Norman.
10/1/17	I want to take 201 level classes for Excel and Bluebeam, too.

Development Matrix

PROJECT MANAGEMENT			
Core Competence		Skills	Additional Opportunities for Improvement
Personal Skills	Starting-Level Project Engineer	<ul style="list-style-type: none"> Solicit feedback on technical & EQ abilities, then establish an improvement plan Demonstrate ability to manage conflict (measured by 360 feedback) Demonstrate effective time management (measured by 360 feedback) Skilled at writing and oral communication (measured by 360 feedback) 	Leadership Training Conflict Resolution Personality Testing (DISC, Meyer's Briggs, etc.)
	Advanced-Level Project Engineer	<ul style="list-style-type: none"> Proactively sets self improvement goals and seeks feedback (measured by 360 feedback) Timely completion of all tasks (measured by 360 feedback) Positive, can-do attitude that inspires others (measured by 360 feedback) Supports and teaches new PEs and Interns (measured by 360 feedback) 	
	Starting-Level Project Manager	<ul style="list-style-type: none"> Mastered personal skills required of a PE Resolves conflicts efficiently (measured by 360 feedback) Lead others (measured by 360 feedback) Good listener and empathetic (measured by 360 feedback) Addresses difficult situations early (measured by 360 feedback) 	
	Advanced-Level Project Manager	<ul style="list-style-type: none"> Creates work/team environment others strive to be a part of Develops personal relationships with clients Step aside for team member best suited for the task (positive delegation) Leadership that inspires others and develops future leaders (leading leaders) 	
Planning, Scheduling and Procurement	Starting-Level Project Engineer	<ul style="list-style-type: none"> Maintains job files (RFIs, Specifications, Addenda's and as-builts for the project) Prepares, reviews and distributes RFIs in a timely manner (measured by PM and Super) Reviews and coordinates all shop drawings for compliance with the Contract Documents Distributes documents to subcontractors: drawings, RFIs, specifications, and addenda Managing the procurement log (measured by PM & Super) 	Last Planner P6-Primavera Leading Pull Planning Lean Construction
	Advanced-Level Project Engineer	<ul style="list-style-type: none"> Procure material and equipment in a timely manner (measured by Super and PM) Problem solver that creates workable solutions to keep project on schedule (Measured by 360 feedback) Firm understanding of contract drawings and specifications (measured by PM and Super) Supports Superintendent with updating master and rolling 4-week schedule 	
	Advanced-Level Project Engineer	<ul style="list-style-type: none"> Effectively documents impacts to the project schedule and notifies owner 	

Rethink On Boarding

- Extend on boarding period and truly give employees tools
- Four days covering all aspects of the company
- Important to give employee global view even if they don't touch some of it in their roles
- Scheduled lunches to meet as many people as possible



New Hire On Boarding, September 11-14, 2017

Day 1, Monday, September 11

Time	Activity	Presenter
8:00-9:00	Drug Test	Facility on Burnside
9:00-10:00	Office Tour/Time with On Boarding Sponsor/ Quick photos (Shane) Will Mau (PE) Sponsor: Greg N Jamey Shaw (SUP) Sponsor: Frank Lee Sophie Grodsinsky (PE) Sponsor: Luke	Sponsors Shane
10:00-12:00	Fortis History and Culture	David/Tim
12:00-1:30	Lunch with management committee members or on boarding sponsor at Gracie's	Tim
1:30-3:30	Tech Basics: VP, Sharefile, Skype, Change PW, Link, Citrix, receive laptop, phone (if applicable)	Nathan/Brent
3:30-4:30	Time with market sector lead	Greg

Day 2, Tuesday, September 12

Time	Activity	
9:00-11:00	Safety	Emily
11:00-12:00	Estimating	Blain
12:00-1:30	Lunch	Rene
1:30-3:30	Safety	Pam
4:00	Photo: 239 NW 13th Ave, Kelly Dulcich Photography	Amy

Day 3, Wednesday, September 13

Time	Activity	
8:00-9:00	Scheduling	Jason
9:00-10:00	Fortis Code (Ethics)	Donna
10:00-10:30	Harassment	Donna
10:30-11:30	QMP	Dave W
11:30-12:30	Lunch	Theola
12:30-2:00	Bluebeam	Kat
2:00-3:00	Raken 101	Tim
3:00-4:30	Cost Mgmt.	Mike W

Time	Activity	
9:00-10:00	Subcontracts	Michele/Chris M
10:00-11:00	BIM	Shawn/Phil
11:00-12:00	Expense Reports	Kevin R/Donna
12:00-1:00	Lunch (challenge invite someone new)	On Own
1:00-2:30	Viewpoint / Timesheets	Luke/ Bryce
2:30-3:00	ILP	Donna
3:00-3:30	Marketing Overview	Shane



Lessons Learned

- Evolve the program monthly through targeted feedback
- SurveyMonkey survey given at the end of each session
- Some great ideas that we have been able to implement
- On Boarding program has been a game changer for new hires



Changes We've Made Along the Way

- Extended some sessions
- Scheduled lunches everyday instead of just the first day
- Put handouts in folders
- Got rid of happy hour
- Added market sector session
- Added printed piece outlining the entire process
- Developed additional in-house presenters



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Feedback – Plus/Delta

“Flash cards + case studies, history and culture” People love the interactive nature of our training materials.

“GREAT, one of the best sessions I have ever attended.”

“Provide binder/folder with all handouts instead of loose packets.”

“Thank you for the comprehensive on-boarding. I have not seen this type of effort in ensuring new employees have the information they need to be effective immediately.”

“All the hands-on things were great, perhaps doing a quick, small estimate and packing it together.”

“So, glad we do this - every company should be doing exactly this!”

“I think it would be helpful if there was a transition plan of what exactly to do from the end of onboarding and to the next day (Friday) of normal work.”



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More Feedback– Plus/Delta

“I suggest assigning people in the office to take each on boarder out to lunch, or ask for current Fortis volunteer employees to participate to make the on boarders feel more welcome and part of the team and to build more relationships right out of the gates.”

“I think it would be cool to spend an hour or so going through a high overview of the entire life of a job from beginning to end just to get a basic understanding of what a job cycle looks like at Fortis.”

“This program is great. It is the most comprehensive overview/onboarding that I have ever seen. I am impressed with the commitment to doing it.”

“I think that I would benefit from a "Market Sector" overview from the Market Sector lead. Here is what we do in each market sector--project types, locations, people, goals, etc.”

Success dependent on key underlying strategies

- Compelling training. Why do they need to learn this?
- Simple is better. Think easy and accessible.
- Content is not role specific; bridges all roles in the company
- Content focused and task-oriented
- Flexible content and delivery (multiple modalities)
- Employees involved in the development and delivery of the content. Model the expected behavior.
- Performance support vs. training

Questions



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