



Case study

Name: Bureau Veritas (Mechanical Division)
Sector: Specialist services in testing, inspection and certification of mechanical equipment
Location: Mobile workforce operating throughout the United Kingdom and the Republic of Ireland

Inspecting Performance to find the Art of the Possible

Bureau Veritas UK provides specialised services in testing, inspection and certification for a range of assets including cranes, lifts, pressure vessels and mobile plant. For their clients, the service delivered by Bureau Veritas assures quality, reduces cost, risk and ensures the maximum efficiency of plant and operational facilities.

Driven by a core business mission to 'shape a world of trust' for their clients and society, there had been a desire to improve the margin of the business by improving processes, sourcing better quality data, and driving a more performance based culture via the line management structure.

The company's largest UK business unit, the Mechanical division, hadn't been meeting margin expectations in a market that was becoming increasingly competitive. Comprising around 250 field-based mechanical surveyors and a central Planning team, the Mechanical operation was an important place to start if the business were to be successful in achieving their desired goals.

Key challenges

- Inconsistent and ineffective metrics were making it difficult for Bureau Veritas to monitor surveyor performance, which was ultimately impacting the manager's ability to manage performance and productivity levels
- Limited control and visibility of the planning process, managers had highlighted underutilisation of resources
- Administrative backlogs had caused instances where asset information was out of date and inaccurate, leading to wasted journeys and revisits

Key gains

- A central and accurate reporting suite showing surveyor performance on a daily, weekly and monthly basis by individual, team and region
- Surveyor productivity increased by over **10%** resulting in significant financial benefits and a **4:1 ROI**
- Upskilled and more proactive operational management team
- Additional financial benefits through implementing a standardised and aligned management structure
- Standardised scheduling principles and planning processes supported by a performance focused review structure to ensure maximum surveyor utilisation
- Clear roadmap set out for the scheduling team, supported by a successful trial showing further productivity gains, from calling clients ahead of visits to confirming details and times



"If Mechanical performs, the rest of the business performs, and we've got that to a level now where it's really, really strong, which gives me a platform to do all of the things that I'd like to based off of that success."

Steve Lea, Business Unit Director, Bureau Veritas UK



Introduction

Ultimately, Bureau Veritas wanted to increase margins and improve contract SLA performance. Revenue opportunities had been missed due to poor change control and administration, and there was a recognition within the Senior Management team that efficiency improvements were needed across the operational and planning teams, where processes typically involved multiple handoffs and poor quality information was leading to additional effort, revisits and delays.

With a new automated planning tool due to be launched at the end of the year, Bureau Veritas' Divisional Director, Steve Lea, was keen to introduce effective scheduling principles with existing systems to support the new platform. Steve said: "We had also employed a new Business Unit Director for Mechanical, so it was the perfect time for us to engage with Managementors to help us build the platform that we needed."

Following a two-week analysis phase undertaken by Managementors, the proposed scope of this project was to focus on the Midlands and North regions, as well as mobile plant which operates at a national level.

The Challenge

The review phase and the first few weeks of the engagement uncovered a number of opportunities for improvement across both the Operational and Planning teams:

Operational

With the responsibility of ensuring that the surveying teams across the field were operating at their most productive, it was evident that the Operational Managers weren't effectively driving the performance of their teams and lacked the tools with which to do so. Surveyors weren't managing and prioritising their workload and, as a result, underutilisation was regularly occurring and becoming an issue for them.

Alongside this, the structure with Team leaders, simply didn't work, as they were often stepping down to fulfil surveyor duties, ultimately limiting their time to actively manage their teams.

“Looking back over the week, reviewing timesheets for all of my surveyors, it was impossible to see where the issues might be, and it was too late by then anyway!”

Regional Manager



Planning

The Planning team, who were largely office-based, were responsible for ensuring that surveyors were fully utilised and inspection expiry dates were adhered to. Understanding the main causes for underutilisation and job frustration in this area was a key focus. It was evident that there wasn't a defined set of planning principles in place and an absence of accountability and ownership for creating, delivering and managing against the plan.

With limited visibility around planned works and actual resource required together with fractured communication with the client, there were frequent unsuccessful visits. Work was being overbooked resulting in excessive time being spent rebooking, and unnecessary time was also being spent responding to customer invoicing queries.

Through clearer processes and better discipline, less revenue would be put at risk through disputes around what work had been completed or the quality of service delivered against contracts.

Across both the Operational and Planning teams, significant amounts of time were being wasted as a result of poor quality information being passed between teams. One of the Senior Planners commented "It would be really helpful to start understanding why we don't stick to the plan for the day."

Overall, there was a strong recognition that a better defined performance review structure, enhanced processes to facilitate issue capture and resolution and standardised ways of working across teams, would contribute towards optimising the performance of the division and increasing margins. Steve commented "The way the Managementors team presented the findings back to our Senior Management team really helped to get their buy-in and paint the picture of what needed to change. The entire analysis phase was fantastic in helping us to identify the gaps."

Our Approach and Outcomes

The Managementors team worked hand-in-hand with key members of the Bureau Veritas team, from Operational Managers, MI Analysts, Planning and Back-Office Management, to develop the solution as a collective.

To kick off Project Cascade - what was to be a great change journey for all involved - Managementors developed and delivered a series of introductory sessions, helping to define a strong project team with clear objectives and a common understanding of how we were going to achieve them.

In order to fully understand the challenges faced across each area, and to begin laying the foundations and principles for strong effective management, Managementors ran a number of training sessions and workshops with various teams. From these sessions, a number of quick wins and additional workstreams were identified, members of the Bureau Veritas team were assigned ownership of project tasks and daily performance reviews were set up for improved short interval control. "I can now see where we're going off track ahead of time!" highlighted one of the Area Managers.

Following on from the initial project activities, two core areas of focus were identified; the first being to ensure that Operational Management were managing their teams effectively. A fundamental enabler for this was spending time on the ground, supporting the Area Development Managers and Regional Development Managers in coaching the right behaviours first-hand; to set appropriate targets, to ask the right questions, actively look for the areas to improve performance and to take action against them.



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“As a result of active management being better, I'm seeing the direct benefits of that in terms of customer satisfaction and employee satisfaction.”

Steve Lea, Divisional Director

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“I wanted to become a more active manager. The weekly meeting is a great opportunity to support my team and make sure the schedule for my region is where it should be!”

Area Manager

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This was further improved and embedded by developing the appropriate tools and processes within the operation; effective review structures, a mechanism to capture, review and resolve issues at their root cause and a trusted, accurate and bespoke performance reporting suite showing surveyor performance on a daily, weekly and monthly basis by individual, team and region. One of the Area Managers commented “It’s great that we now have visibility of the issues our surveyors are facing on a daily basis. It’s now up to us to review and action these for our teams.”

As a result of effective performance metrics and better visibility of performance as well as upskilling of the Operational Managers, surveyor productivity increased by over 10%, resulting in significant financial benefits, and a 4:1 ROI on the project. There were also additional financial benefits coming from embedding a redesigned management structure.

Immediate improvements within the planning team were realised by developing clear planning priorities and principles, in collaboration with the team. In addition to this, a focus on performance was embedded within the planning managers, by establishing the desired behaviours to drive daily utilisation and accountability for this, enabled by an effective review structure and reporting.

Upon establishing the basics in planning and an initial improvement in surveyor productivity through a series of quick win activities, it became clear that one of the biggest opportunities for further productivity gains was to minimise cancelled or failed visits. As a result, Managementors and the Planning Managers designed and successfully trialled a new process to confirm the plan with the client ahead of time, which resulted in a 50% increase in adherence to the plan and a 17% improvement in productivity for the trial group. A detailed plan was then developed to roll out to the entire planning team, including additional requirements to enable planners to carry out the new process.

Underpinning this performance improvement within Project Cascade was the development and deployment of a Management Operating System (MOS) providing the operation and its associated functions with well entrenched methods to forecast, plan and control the operation on a daily, weekly and monthly basis.

Reflecting on the project, Steve explained “I went out to visit one of the first line managers recently and spent some time with someone in his team and everything that I had wanted to achieve I saw on that day. It was a surveyor that was actually happy with the work he was being given, he knew what he needed to do and the time he was given to do it. He saw his manager on a regular basis, which was a big thing for me, and that only happens if you’ve got active managers, which we recognise that we may have had issues with in the past, so this was a really important benefit for me.”

“The engagement within Mechanical turned out exceptionally well and surpassed my expectations! We’ve continued to measure in the same way that we were when Managementors were with us and we’re really seeing a sustained improvement there, even a bit higher than we were before, so I’m really happy with that.”

Project Cascade enabled the Bureau Veritas’ Mechanical division to increase output and have greater confidence that capacity existed within the operation to deliver the desired increased revenue forecasted for the forthcoming year. Furthermore, the project provided the opportunity to increase right first time delivery, reduce repeat visits and avoid customer frustration.

The success of the project and the results delivered also led to additional work with Bureau Veritas to implement a continuous performance improvement solution within their HSI Business Unit.



“We now have more rigour and better processes, which enable greater control.”

Steve Lea, Divisional Director

Contact us to find out what Managementors can do for you

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