



## **Multi-company Project Management**

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**Note:** The book “**Multi-company Project Management: Maximizing Business Results through Strategic Collaboration**” provides instructions for use of all the agenda templates listed above.



## **TEAM IMPLEMENTERS, LLC**

Project & Manufacturing Team Solutions

### **Agenda Specification Review**

Specification Overview	
Mechanical	Customer. Mechanical. Engr.
Electrical	Customer. Electrical. Engr.
Key Points from Pre-Award Meeting	Customer. Project Mgr.
Customer Processes	
Engineering Change Requests	Customer Project Manager
Documentation	or as assigned
OEM Presentations	
Mech Engr Concept and Status	OEM Project Manager. or
Controls Architecture and Status	as Assigned
Timing of Engineering Reviews	
Sub-Supplier Presentations	
Mech Engr Concept and Status	Supplier Project Manager. or
Controls Architecture and Status	as Assigned
Timing of Engineering Reviews	
Open Issues Review and Assignments	



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### **Agenda Fact Finding**

#### OEM Press System

- Macro Timeline
- Resources (Quantity and Type)
- Pre-Conditions
- Special tools
- Supplier Support

Press Supplier

#### Front of Line

- Macro Timeline
- Resources
- Pre-Conditions
- Special tools
- Supplier Support

Front of line Supplier

#### End of Line

- Macro Timeline
- Resources
- Pre-Conditions
- Special tools
- Supplier Support

End of Line Supplier

#### Site Preparation Planning

Customer Project Mgr.

#### Summarize Questions

- Review Questions
- Assign Responsibility
- Set Response Date

Designated Project Mgr.



## **TEAM IMPLEMENTERS, LLC**

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### **Agenda Leadership Formation**

#### **FIRST DAY**

- Present MPM Concept
- Agreement on Norms
- Develop Personal History Presentation
- Personal History (Presented as Individual to Group)
- Develop Organizational Structure Presentation
- Present Organization (Presented as a Company to Group)
- Lunch
- Complete Situational Management Matrix
- Begin Brainstorming Process
- Evening Social Activity

#### **SECOND DAY**

- Complete Brainstorming
- Categorize Brainstorm Data
- Develop Overall Mission Statement
- Develop Goals From Above Categories
- Working Lunch
- Agree on Mission Statement
- Agree on Project Goals
- Develop Action Plans
- Communication Tools (Website)
- Plan Next Meeting (Entire Group)
- Assign Individual to Publish Minutes (Entire Group)
- Wrap Up



## **TEAM IMPLEMENTERS, LLC**

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### **Agenda Engineering Formation**

#### **FIRST DAY**

- Present MPM Concept (Presented by Project Manager)
- Agreement on Norms
- Develop Personal History Presentation
- Personal History Presentation (Presented as Individual)
- Develop Responsibility Chart
- Present Responsibility Chart (Presented as a Company)
- Lunch
- Present Mission Statement and Goals (by Co-Chairs)
- Specification and Engineering Review
- Summarize Open Issues Identified in Above Items
- Evening Social Activity

#### **SECOND DAY**

- Review Leadership Brainstorming Items Related to Engineering and Consolidate with Engineering Open Issues (Customer & OEM Project Managers Present to Entire Group)
- Divide Consolidated List into Categories
- Develop Actions, Assign Responsibility and Establish Timing Related to Items Assigned to Subgroup
- Working Lunch
- Subgroups Present Above Action Plans for Concurrence
- Agree on Format to Track Open Issues and Actions
- Communication Tools (Website & Conferencing)
- Assign Individual to Publish Minutes (Entire Group)
- Plan Next Meeting and Wrap Up (Entire Group)



## **TEAM IMPLEMENTERS, LLC**

Project & Manufacturing Team Solutions

### **Agenda**

#### **Installation and Start Up Formation**

##### **FIRST DAY:**

- Present MPM Concept Structure (by Designated Proj. Mgr.)
- Agreement on Norms
- Personal History Presentations
- RASIC Charting
- Lunch
- Mission and Goals (Presented by Co-Chairs to Group)
- Develop Statement of Work
- Site Access and Safety Requirements
- Evening Social Activity

##### **SECOND DAY:**

##### **Fact Finding and Action Planning**

- OEM Presentations (OEM's to Entire Group)
  - Pre-Conditions
  - Special Material, Tools, People
  - Macro Timing with Special Items
  - Requested Resources, Skilled Trades
- Develop Questions to OEM's (Entire Group)
- Make Assignments for Missing Data
- Plan visit to manufacturer to observe equipment run off
- Lunch

##### **Scheduling**

- Work Elements and Resources (Cross Company Sub-Teams)
- Assemble Preliminary Plan (Entire Group)
- Set Date to Finalize the Installation or Start-Up Plan

##### **Communication Tools**

- Website
- Weekly Conference Call

##### **Wrap Up**



## **TEAM IMPLEMENTERS, LLC**

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### **Agenda Leadership Team Regular Meeting**

Agenda Review & Approval	Host Key Executive
Review Norms, Mission, & Goals	Host Key Executive
Safety Topic Presentation (Optional)	Volunteer
Project Status Review	
Supplier perspective	Supplier Project Mgr.
Sub supplier perspectives	Sub Supp. Project Mgr's
Customer perspective	Customer Project Mgr.
Lunch and Site Tour	Host Project Manager
Open Issue Action Items review	As Assigned
Escalated Open Issues	Issue Representative
Change Requests	Initiating Project Mgr
Risk Management	Group Exercise
Identify new open issues from the meeting	Host Project Mgr
Resolve, Delegate, or Assign new items	Group Exercise
Wrap Up	Host Project Mgr
Summarize new decisions and leadership actions	
Formalize agreement on next meeting date and site	
Assign responsibility and date to publish minutes	
Pre or Post Meeting Social Event (ie: Dinner, group activity, etc. outside normal business hours)	Host Key Executive



**Agenda**  
**Engineering Team Regular Meeting**

Agenda Review & Approval	Host Key Executive
Review Norms, Mission, & Goals	Host Key Executive
Safety Topic Presentation (Optional)	Volunteer
Project Design Review	
Sub supplier Design Status	Sub Supplier Project Mgr's
Sub supplier submission approval	Supplier. Lead Engr.
Design Submissions & Status	Supplier Project Manager
Customer Approval of submissions	Customer Lead Engr.
Customer Design perspective	Customer Project Mgr
Lunch and Site Tour	Host Project Manager
Open Issue Action Items review	As Assigned
Engineering Change Requests	Initiating Project Manager
Identify new open issues from the meeting	Host Project Manager
Resolve Delegate or Assign new items	Group Exercise
Wrap Up	Host Project Manager
Summarize new decisions and Engineering actions	
Formalize agreement on next meeting date and site	
Assign responsibility and date to publish minutes	
Pre or Post Meeting Social Event (ie: Dinner, group activity, etc. outside normal business hours)	Host Project Manager





## **TEAM IMPLEMENTERS, LLC**

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### **Agenda Leadership Project Closeout Location: Customer Site TBD**

Welcome and Review of Norms	Customer Key Executive
Review Project Goals and Deliverables	Co Lead Key Executive
Project Evaluation	Customer Project Mgr
Identify and Detail Follow Up Actions	Supplier Project Mgr
Review Customer Satisfaction Ratings	Project Managers
Lessons Learned Review and Discussion Customer Lessons Learned Equipment Supplier Lessons Learned Sub Supplier Lessons Learned Discussion of Key Lessons	As Assigned
Review and Discuss MPM Survey Summary	Assigned Project Mgr
Discussion of Future Opportunities Customer Perspective Supplier Perspective Sub Supplier Perspective	As Assigned
Wrap Up Verify all issues have been closed Distribute MPM Survey Summary Assign and set date to distribute minutes	Host Key Executive
Project Closure Celebration Event	



**Agenda**  
**Leadership Team Formation**

Introductions & Agenda Review	Customer Key Executive
MPM <sup>2</sup> Process Overview	Consultant/Project Manager
Norms	As Assigned
Personal History	As assigned
Opportunity Assessment Report	Customer Tech Representative
Customer Perspective (Issues & Opportunities)	Cust. Operations Manager.
Resource/Results Matrix	Project Manager
Identify Key Improvement Areas	As Assigned
Form & task the Measurement team	Customer/Supplier Key Exec
Wrap up	Project Manager
Address any open issues	
Review assignments and action plans	
Set next Meeting Date	
Set responsibility and deadline for distribution of minutes	



## **TEAM IMPLEMENTERS, LLC**

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### **Agenda Leadership Team Improvement Planning**

Welcome -	Customer Key Exec
Review Norms from first meeting	Customer Key Exec
Review Action Plans from first meeting	Project Manager
Measurement team report	Customer Numbers Repr.
Establish Improvement Goals	Supplier Repr/Consultant
Develop improvement team assignments	Customer Operations Mgr.
Define requirements for each Improvement Event	Supplier Repr./Consultant
<ul style="list-style-type: none"><li>• Equipment</li><li>• Material</li><li>• Manpower</li></ul>	
Set Macro timing for Improvement Events	Customer Repr.
Leadership participation & review process	Project Manager
<ul style="list-style-type: none"><li>• Daily Improvement Team Status</li><li>• Improvement Team Summary Reports</li></ul>	
Prepare agenda for Improvement Event I	Customer Repr.
Wrap UP	Project Mgr/Consultant



# **TEAM IMPLEMENTERS, LLC**

Project & Manufacturing Team Solutions

## **Event I Schedule of Daily Activities**

<b><u>Monday</u></b>	<b><u>Time</u></b>	<b><u>Location</u></b>
Daily Improvement Team Meeting	???	Conf Rm
Introductions & MPM <sup>2</sup> Process Overview		
Norms, History, Roles		
Brainstorm Improvement Ideas		
Select best solutions		
Develop Improvement Plan		
Lunch	???	
Separate into team activities to execute plan	???	Plant Floor
Daily Update meeting	???	Conf Rm
Assign follow up items to 2 <sup>nd</sup> shift		
<b><u>Tuesday</u></b>		
Daily Improvement Team Meeting	???	Conf Rm
Review 2 <sup>nd</sup> shift follow up		
Adjust plan based on previous days results		
Separate into team activities to execute plan	???	Plant Floor
Lunch	???	
Separate into team activities to execute plan	???	Plant Floor
Daily Update meeting	???	Conf Rm
Assign follow up items to 2 <sup>nd</sup> shift		
<b><u>Wednesday</u></b>		
Daily Improvement Team Meeting	???	Conf Rm
Review 2 <sup>nd</sup> shift follow up		
Adjust plan based on previous days results		
Separate into team activities to execute plan	???	Plant Floor
Lunch	???	
Separate into team activities to execute plan	???	Plant Floor
Daily Update meeting	???	Conf Rm
Assign follow up items to 2 <sup>nd</sup> shift		
<b><u>Thursday</u></b>		
Daily Improvement Team Meeting	???	Conf Rm
Review 2 <sup>nd</sup> shift follow up		
Adjust plan based on previous days results		
Separate into team activities to execute plan	???	Plant Floor
Lunch	???	
Separate into team activities to execute plan	???	Plant Floor
Daily Update meeting	???	Conf Rm
Begin preparing report out presentation		
<b><u>Friday</u></b>		
Finalize Presentation	???	Conf Rm
Event I Report Out	???	Conf Rm



### Event II Schedule of Daily Activities

<u>Monday</u>	<u>Time</u>	<u>Location</u>
Planning session with team leaders and facilitators	???	Conf Rm
<b><u>Tuesday</u></b>		
Daily Improvement Team Meeting	???	Conf Rm
Review homework results		
Brainstorm control methods		
Plan week's activities		
Separate into team activities to execute plan	???	Plant Floor
Lunch	???	
Separate into team activities to execute plan	???	Plant Floor
Daily Update meeting	???	Conf Rm
Assign follow up items to 2 <sup>nd</sup> shift		
<b><u>Wednesday</u></b>		
Daily Improvement Team Meeting	???	Conf Rm
Review 2 <sup>nd</sup> shift follow up		
Adjust plan based on previous days results		
Separate into team activities to execute plan	???	Plant Floor
Lunch	???	
Separate into team activities to execute plan	???	Plant Floor
Daily Update meeting	???	Conf Rm
Begin preparing report out presentation		
<b><u>Thursday</u></b>		
Finalize Presentation	???	Conf Rm
Event II Report Out	???	Conf Rm
Improvement Team recognition	???	Plant Floor?



**Agenda**  
**Leadership MPM<sup>2</sup> Close Out Meeting**

Welcome and review of Norms	Customer Key Executive
Review Improvement Goals	Supplier Key Executive
Review Validation Results	Customer Representative (From Measurement Team)
Overview of MPM <sup>2</sup> Survey Results	Project Manager
Identify and detail any follow up actions	Project Manager
Lessons Learned Review and Discussion Customer Lessons Learned Equipment Supplier Lessons Learned Discussion of Key Lessons	Consultant Facilitates Customer as assigned Supplier as assigned Team Discussion
Discussion of Future Opportunities	Customer as Assigned
Wrap Up Verify all issues are closed	Consultant