

AN INTRODUCTION TO PULL PLANNING

FINDING “AHA!” BEFORE “OH NO!”

The overriding purpose of conducting a **Pull Plan** exercise is to gather all participants in an upcoming phase of work to discuss, as a team, the proper sequence, durations, identify conflicts and find resolutions for the work. Gathering all the “experts” promotes a coordinated effort to planning and sequencing the steps involved in a particular phase. Benefits of these exercises include:

- Specifies handoffs and communicates quality and performance expectations
- Better understanding of the work preceding and following their own
- Promotes a team approach to successfully, efficiently sequence work
- Better communications
- Collaboratively produces a sequence agreeable to everyone
- Better understanding of the overall expectations
- Emphasizes optimal team productivity rather than individual self-interest. Theoretically if the team is more productive most individuals will also realize better productivity, which saves everyone money!

WHAT ARE THE EXPECTATIONS THAT WILL LEAD TO THE MOST SUCCESSFUL PULL PLANNING SESSION?

It is imperative that the right participants come to the Pull Plan exercise and they come prepared. Pull Plan exercises generally require two or more representatives from each scope of work included in the phase being discussed. The exercise will quickly get bogged down if participants are not prepared to efficiently discuss their scope. Please prepare by:

- Having at least one representative in attendance to discuss specific effort required to complete your scope of work.
- Having at least one representative in attendance to discuss contract obligations, available to negotiate with other entities for advantageous practices.
- Know the scope and area (specific location) that will be discussed. If the scope and area are not clear, contact Mortenson prior to the meeting for clarification.
- Understand the time scale that will be used (i.e. some exercises break down activities into months, some break activities into weeks and some break activities into days which correlate, respectively, to high level schedule, to mid-level schedule, to detailed level schedule results.)
- Know the details for the scope and area to be discussed. Bring any drawings/ materials you feel are pertinent to your discussion.
- Be prepared to discuss durations of your work.
- Be prepared to discuss your work as it pertains to preceding work and follow on work.
- Understand that we are looking to expose as many problems as early as possible so that we can resolve, or begin the work of resolving, the issues prior to construction. If we are successful it should translate into increased productivity, increased quality, and a better end product for everyone, including the owner.
- It is generally acknowledged that durations and logic thought up prior to the meeting are best case scenario and in the best interests of your operation. Be prepared to discuss alternative scenarios, in the best interest of the Project.