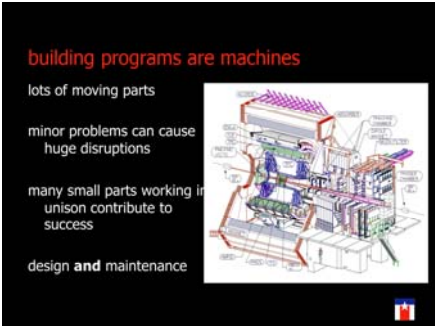
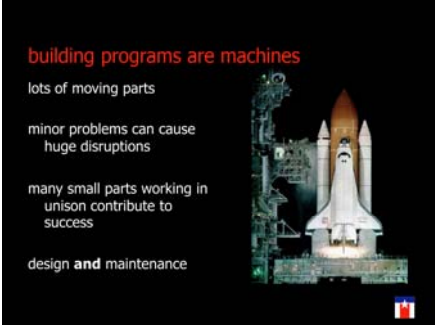
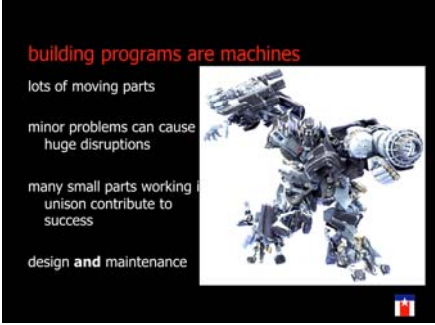





	<p>program is “Roll-out rules - building success in multi-unit programs”</p> <p>My name is Rick Hibbs - I have been practicing architecture and interiors for over 25 years most of that time designing, managing and leading in corporate interiors projects.</p> <p>IA Interior Architects founded on the concept of providing consistent quality and service to large organizations across many locations.</p>
	<p>Large-scale building programs, whether for retail banking, mall stores or corporate office space, are complex machines with many moving parts.</p>
	<p>They require both great initial design and constant maintenance to keep them moving. Each decision and action affects the entire program, and seemingly minor decisions have long-lasting impacts.</p>
	<p>in the best case, these programs will provide constant streams of work that can keep teams of architects busy through other fluctuations in markets and workloads. unfortunately, sometimes these complex machines begin to take on a life of their own – they may not be so friendly</p> <p>in the worst case, they can gobble up teams and spit them out again, leaving chaos and carnage in their wake in the form of lost client relationships and unemployed teams. This is not always the fault of the architect or any other consultant, nor is it the fault of the client or their project managers</p> <p>I believe there are specific skills that can be learned, taught and shared – if the team is willing, and it is almost always in their best interest, there are a few basic principles that can be applied to these programs that can at least help to keep these machines running and under control</p>

<p>not all roll-outs are the same</p> <ul style="list-style-type: none"> prototype – roll-out conventional retail programs site-adapt standards programs any multi-project client 	<p>What is a roll-out program?</p> <p>retail prototype development and roll-outs, where each project has a certain set of fixed parameters - an established design vernacular, if not an exact copy of the project that gets repeated over and over again in many locations.</p> <p>perhaps broader than this conventional definition</p> <p>my experience – firm that did exclusively multi-unit retail - we developed prototypes of mall stores, big box retail, grocery stores, restaurants and the like. We then had teams that replicated these designs in each of the specific locations. The design process was segregated from production - in some cases design was not even done in the same office as the production – it was true roll out –</p> <p>IA - a firm who's strength is in on-call relationships - a strength that was built especially with financial services firms, but has now expanded to work with law firms, high-tech and telecommunications, and services organizations.</p> <p>while each of these situations are different, there are also some similarities that allow us to think about the long-term on-call programs in ways that are helpful to developing a methodology to handle and manage them</p>
<p>not all roll-outs are the same</p> <ul style="list-style-type: none"> prototype – roll-out conventional retail programs site-adapt standards programs any multi-project client 	<p>conventional multi-unit programs follow a prototype – roll out pattern. These are the kinds of programs that apply to big-box stores, branch banks and mall stores. the architect that develops the prototype may or may not be the same that is involved in the roll-outs or site-adaptations</p> <p>most firms will have templates for each prototype in the program, and sometimes there can be several – for example, a particular retailer might have 20k, 30k and 40ksf prototypes all going at once, depending on the market and site availability. within the prototypes, there will be minor variations, but essentially, for branding and merchandising reasons, each prototype is intended to be as consistent as possible from one site to another.</p>
<p>not all roll-outs are the same</p> <ul style="list-style-type: none"> prototype – roll-out conventional retail programs site-adapt standards programs any multi-project client 	<p>some retailers, though want each store to be unique, or they deliberately choose sites in each community that reflect their market strategy for that neighborhood. this might apply to some grocery chains or branch banks – and it applies to national retailers like The Gap or Banana Republic in older urban neighborhoods - Georgetown, North Beach, Newberry Street or Michigan Avenue. most important design challenge is to translate the client's brand into the varying sites. Each project will be unique, and a close relationship between the architect and the client's in-house design staff is required to keep everyone on the same page.</p>

not all roll-outs are the same

- prototype – roll-out
- conventional retail programs
- site-adapt
- standards programs
- any multi-project client



In a much broader sense, though, these principals also apply to clients that have more “standards” and less “prototype”

These clients also will have a list of projects and dates that each must roll-out, and they will have more or less strict design branding and operational standards, but each location will also require the architect to satisfy not only the corporate needs, but also the needs of the local branch manager, the local staff or other stakeholders. More than the other models we have talked about so far, each project is unique. Architectural details, materials and finishes may be developed to respond to the specific needs of the location.

in corporate standards programs, the standards, branding, and operational goals are the most important - these projects use a more conventional process, including programming and schematic design – which may not be present in rolling out of a prototype. There is less separation between design and production.

not all roll-outs are the same

- prototype – roll-out
- conventional retail programs
- site-adapt
- standards programs
- any multi-project client



so, for the purposes of this conversation, I would like to include most any client relationship that involves providing architectural services to the same client in multiple locations

not all roll-outs are the same

differences –

- local requirements
- jurisdictions
- project managers



even in the most rigid prototypes, there are differences for each project - local codes, of course, different jurisdictional requirements, submissions, etc.

most significantly, different project managers - who have different interpretations of the program and processes.

As an example, I recently worked on a project for a large energy company. IA has a long-term relationship with the company, having done dozens of projects for them over the last several years, mostly on the west coast. My project manager, though was based in Texas, and as we were initiating the project we were discussing the standards and protocols that we would use for the project, it became quickly evident that although the process used the same names, it did not resemble the process we had been using on the west coast.

Another client that I am currently working with in several locations believes very strongly and sincerely that their standards program is comprehensive, complete and accessible to their design partners. They maintain it on a website that provides access to various resource that we - as their design firms working for them - might need in the course of the projects. The ugly truth is that their standards are neither comprehensive or complete, they are almost universally out of date, and they are organized in a system that is so arcane that it would be a full-time job just to understand it. So the conversation goes like this –

Just follow the standard on the site - there is no standard on the site - oh, did you check the folder? - yes - oh, then it must be in this other folder - ok - there it is. - oh, well actually that is the old standard - we just developed a new one, use this - I will email it to you - but in this case, we may want to do something different...

clearly there are standards, then there are how the project managers interpret the standards.

not all roll-outs are the same

similarities –

- branding
- details
- quality
- client relationship



in all cases, though, branding is critical

- there are many different forms and uses for the branding

internal, for recruiting, standardization of operations, marketing or all of these

external for sales, merchandising

client relationships – keep them healthy, develop shared goals, stay on schedule and budget

the four rules




- investigate early
- build trust
- understand and manage change
- control the pace



so, without further delay or suspense, here they are – the ancient secret and magic rules for successful roll-out programs

investigate early - build trust - understand and manage change - control the pace

hopefully this afternoon I can elaborate on each of these in a way that will help you incorporate some of these things that you probably already know into your programs so that they will, in fact be more successful.


<p>look before you leap investigate first, before committing to a site early and thoroughly the right consultants</p> 	<p>Investigate sites early and thoroughly</p> <p>you would think every client would do this – but often the split between Real Estate departments and project management causes this disconnect – they have different goals, incentives and measures of success. their drivers for the ideal site are different, too – real estate is market driven, PM is utility.</p> <p>this might seem simple, but at very early stages of the project, when many of the critical decisions are made, often the project manager does not yet have his or her team on board yet. In these cases it is up to the architect or designer to raise the flag and begin asking questions -</p> <p>geo-tech survey? condition of the existing mechanical system? electrical service, if not, does the budget include new service? asbestos survey, is remediation required? enough parking for the new use? upgrades required to meet accessibility standards?</p> <p>All of these and a hundred other questions should be considered before committing to a site or lease.</p> <p>and of course, the consultants who can investigate and answer these questions might not yet be on the team. Again, as the designer or architect, we can help our clients and ultimately save them money by making them aware of the potential implications of making irrevocable decisions without the complete picture of the site.</p> <p>By having the proper consultants thoroughly investigate before "pulling the trigger" on a site, an owner will have a realistic understanding of the budget and schedule for a project.</p>
<p>look before you leap realistic scope and budget unless the project is killed, the information will be required in later phases anyway</p> 	<p>Most of the time this additional up-front investment will be used during later design phases - it is simply moved to an earlier point on the schedule.</p>
<p>look before you leap turns up deal-breaker information directs time & money to the "right" site, or to the next project</p> 	<p>On the few projects where the initial investigation turns up "deal-breaker" information -- the site is not feasible -- the owner realizes the real pay-off for their investment. Time and money can be diverted to finding the "right" site or to the next project in the roll-out. It is surprising how often this doesn't happen, given the costs, delays and other impacts to a roll-out schedule when a site is killed late in the cycle.</p>

look before you leap

investigate before committing to a site

leverage the consultants

redirect funding to viable projects



trust




one of the most important and far-reaching strategies for improving roll-out programs is to develop and foster trust through good communication.

trust

develop good communication

poor communication - slower

poor communication - more work

informing is **not** communicating

communication strives for understanding, if not consensus




Poor communication in any type of project impedes progress and creates more work for the team. Projects are the most successful when there is a high level of transparency and trust.

so, develop good communication



poor communication - slower, more work

also, it is important to understand and discern the difference between informing and communicating - informing is a one-way tool, while communicating is two-way -

informing is not communicating - communication strives for full understanding, if not always achieving consensus

trust

Stephen M. R. Covey, "The Speed of Trust"

Stephen M. R. Covey, in his book "The Speed of Trust," demonstrates how high levels of trust lowers costs and increases speed,

trust
Stephen M. R. Covey, "The Speed of Trust"

A diagram with three yellow arrows. The left arrow points up and is labeled 'high trust'. The middle arrow points down and is labeled 'low cost'. The right arrow points up and is labeled 'high speed'. An equals sign is placed between the 'high trust' and 'low cost' arrows.

and low levels of trust do just the opposite.
strongly recommend this book

trust
low levels of trust

- each decision weighed for risk
- more "CYA" documentation
- conservative solutions
- no efficiencies from collaboration

A photograph of a person from the chest up, wearing a white t-shirt with the text 'IF YOU'RE TALKING TO ME YOU'RE BEING RECORDED' printed on it.

if you are a part of a team that has very low levels of trust -- each decision will be painstakingly considered for possible risks. More thorough "CYA" documentation will be required, and solutions will be more conservative, without efficiencies that come from collaboration and judicious and creative risk-taking

trust
learn to build trust

- balance "analysis" and "propensity"
- understand "smart trust"
- avoid "blind trust"

A 2x2 matrix with 'analysis' on the vertical axis and 'propensity' on the horizontal axis. The quadrants are: top-left 'distrust suspicion', top-right 'smart trust judgment', bottom-left 'no trust indecision', and bottom-right 'blind trust gullibility'.

so how do we build trust in a team?

The first step is to understand our own predisposition for trust -

think of your self as occupying a place on a trust spectrum. At one firm where I once worked, we did an exercise where we were to stand in a long line - one end was low trust, the other was high trust. even this was surprising and informative to see where our colleagues placed themselves - it helped us realize how we would need to work with each other to establish credibility and trust, and that each of us was different in our approach.

second is to realize that there is a balance between the amount of analysis that should be used to reach a decision.

A high propensity to trust, without enough analysis leads to blind trust, or gullibility, where too much analysis without enough willingness to trust leads to distrust or suspicion.

the objective is to find the right balance - so that we are leading with good judgement - or smart trust.

trust

- trust is **not** based on integrity (but integrity is a component of character...)
- trust is based on **character competence**
- both** can be learned and taught

character - wants to do the right thing

competence - has the ability to execute

both are required to build trust

all members of the team must share these values

they can be learned and taught

trust

a domestic example...

trust

communication

predictable reactions

little discussion required

consistent, coherent

fast & easy decision




lets look at a more “domestic” example - this might become more clear if you think about examples in your own experience.

If you and your spouse trust each other, communicate well, and know how the other will react when your son asks for, say, a motorcycle (or something that might be equally controversial or expensive,) little discussion will be required before giving a consistent and coherent answer -- the decision is fast and easy.

trust

requires thorough, honest communication

increases speed, reduces costs

fosters collaboration

requires character & competence




so, trust

requires thorough, honest communication

increases speed, reduces costs

fosters collaboration and efficiency

requires both character & competence

understand change

change will happen

agreement on managing the change is critical

must happen before the program starts




Most roll-out programs begin with a prototype or standards, but these inevitably change during the course of the program.

it is important to establish the terms of the relationship in advance – before the changes are required – so that when the inevitable happens, everyone on the team understands their relationship to that change, and their responsibilities for it.

there must be agreement about how the change will be managed – and the management includes many different factors



so, what kinds of change are we talking about? from the simple, like design changes of some architectural detail or finishes to more complex changes to the program, like a new strategy about branding, workplace standards or space utilization.

understand change

stakes are higher

evaluate effect of change on the process

determine which projects to implement

understand change

stakes are higher

evaluate effect of change on the process

determine which projects to implement

the reality – though- is that nothing is ever simple

an anecdote about Bank of America in-store branches - we had a project manager who's background was in industrial design - in fact, he participated in the design of the very first first furniture system at Herman Miller in the 60's. He was a great guy, and a good designer, but the problem was that he simply could not stop designing. He was constantly coming up with a new detail, or an improvement that he just knew would solve world hunger and stop global climate change. Every new idea - no matter where we were in the roll-out simply HAD to be included in every project in the lineup.

first, many clients do not determine the ROI for a particular change – the simply come up with a new idea, and want to get it into every project in the lineup. so, even if they have an understanding of the value of a change to their business, they don't understand the cost of implementing major changes at a late stage in the program – as a result there is a huge “middle ground” where a choice to implement or not becomes ambiguous

this is where communication with the client – in advance of starting the program – is critical. A rational client (recognizing that not all clients are rational from our perspective) will understand this, so even if it is not a perfect plan, it might be a very good plan...

in any case if you are to ever have a shot at helping your client make sound rational decisions, you have to work it out in advance, and agree on how you will manage the change

understand change

each change has a different “value” to the program

communicate with the client

agree how to determine value of each change

agree on costs for implementation

they will be more receptive to this if you discuss it before the program begins - A small change rolled into a project that is early in design has almost no effect on the project, but a large change that must be implemented in a project that is about to open will be very costly

understand change

understand the effects

project program team

mistakes change orders

disruption

from a purely selfish point of view, we have to be aware of how implementing any particular change effects your team. A significant change late in the project – say during construction documents – can distract crucial parts of the team -- mistakes happen, and the potential for change orders increases.

Changes happen -- the team must be prepared for them, but each change must be carefully considered. ultimately, if left to chance, all of the cumulative effects of these changes can be disruption – at a cosmic scale


understand change

it is inevitable in all programs

agree how and when to implement changes

agree on costs for implementation

like trust, managing change directly affects project cost and speed.



we have to accept that change is inevitable and ubiquitous

discussions – communication – with the client in advance about ways to quantify and manage change will help everyone be prepared to make effective decisions when it occurs


these will also help the client understand the costs – in fees, construction, and anything else – of implementing change depending on the stage of the project

Like trust, managing change directly affects project cost and speed.

manage the pace

project strategy is based on pace

team size
fee
technology
location



Pace is essential. Every member of the team has based their project strategy on assumptions about the project pace.

typical contracts have a time clause – extension of the schedule caused add services – failure to render decisions in a timely manner causes add services

we must have similar agreement in roll-out projects – more than just contractual

keep Real Estate in the loop, keep their schedule in mind in planning the pace

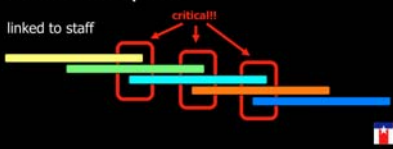
manage the pace

clients measure **openings**

linked to strategic business goals

architects measure **phases**

linked to staff



This is especially true in roll-out programs, which are often tied to strategic business goals -- for example, a retailer's fourth quarter projections depend on opening fifty new stores before Thanksgiving. Because of this the roll-out volume and end dates are typically firm. In order to work most efficiently, start dates should also be firm, carefully timed and forecast well in advance.

the problem can be that our clients measure progress differently than we do. Our clients measure openings – they may want a certain number of openings before a certain date. it matters less to them when the projects start, or what phase projects are in when – on the other hand, we measure projects by phases – because we need specific skills at particular points in the project – a larger team now, a smaller one later.


being able to forecast the requirements of the project are critical to being able to have the right team at the right time.

manage the pace

end dates are fixed

start dates, sometimes...

not so much



Even the largest team cannot work efficiently when the volume is erratic, because of the different skill sets required at different phases

manage the pace
 fluctuations in volume cause "re-deployments" of the program team
 when it re-starts, who is available?




Large fluctuations in schedules or volume might cause the team that is most appropriate for a project to get redeployed to another program. When it re-surfaces, a less-experienced team might be the only one available.

you want a team that knows and understands the program – expectations, standards, lines of communication, process – and you want them available consistently

constant change and re-deployment is difficult to manage and is bad for morale.

manage the pace
 consistency
 forecasting
 efficiency and excellence.





When it re-surfaces, a less-experienced team might be the only one available. Consistency with the forecasted pace creates the opportunity for efficiency and excellence.

You always want you're a-Team on these important programs – without careful control of the pace, this won't be possible

Agreement with the client in advance about how to manage the pace of the project, including buy-in from Real Estate, is critical to success.

thorough and early investigations before committing to a site
great communication & trust
an ability to manage change
forecasting and managing the pace




It takes a skilled team to keep a large-scale roll-out program moving efficiently. There are as many reasons for success as opportunities for breakdown in one of these complex machines.

Perhaps having these tools in the toolbox -- thorough and early investigations, great communication, an ability to manage change, and forecasting and managing project volume -- will help the team keep it running smoothly.

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