



Value Added Consultancy For Utility Professionals

Orbital Project Management

www.orbitalpm.com



Table of Contents

- 01 Do We Need a Consultant?
- 02 An Ounce of Prevention
- 03 Welcoming Collaboration
- 04 Types of Knowledge
- 05 Education vs. Experience
- 06 EI and AQ
- 07 Foresight and Integrity
- 08 Teaching and Training
- 09 Stakeholder Buy-In
- 10 Finding the Right Consultant
- 11 Case Studies
- 14 OPM Consulting
- 15 Contact Us





Do we need a consultant?

Contracting a skilled consultant is the best way to ensure prudent stewardship of project funds, whether taxpayer dollars or corporate or private investments.

An outside consultant's review and opinion are unaffected by factors that often drive decision making for internal employees. Challenging personalities, competing priorities, lack of sufficient experience, and employees' underlying fear of retribution or job loss for speaking up can have disastrous effects on project efficacy, timelines, and budgets.



An Ounce of Prevention

A skilled consultant will not only cover their fees, they may even save you 10-100x or more than the budget loss from a poorly planned or executed project. The sooner in the process you invite an objective expert as a member of the team, the greater the potential project savings.

The best times to enlist the skills of an outside expert are:

- 3 Today
- 2 Yesterday
- 1 During Planning Phase

02



Welcoming Collaboration

Invite collaboration as well as adjustments and corrections to the current plan .

You really do want someone to poke holes in your masterpiece, even if it means more work or doesn't feel great in the moment. Shifting your project mindset from feeling like you must defend it to one where you collaborate with a consultant to make it better is invaluable to your bottom line. We will try our best to make it feel great, too!

Engage an industry expert at the start of a project to steer planning. Having the consultant present at the earliest discussions to move a project forward will prevent time and money spent moving in the wrong direction.

If a project is already nearing bid phase, ask a consultant to identify incorrect, incomplete, or missing specifications that must be adequately addressed before awarding the contract.

For underway projects running over budget or encountering unforeseen difficulties, allocate funds for consultancy to get an objective review and solution set. When you think you cannot possibly spend more is precisely the time you need it the most.

Whether you're the utility enterprise planning the project, the prime bidding the project, or the contractor executing a portion of the project, consultancy can protect your budget.

03

Types of Knowledge

Depth or breadth of knowledge...

Know which one matters more for the scope of your project.

For projects that have minimal potential for downstream impact, depth may be best. A subject matter expert will often have the most detailed and current information about precisely how to proceed and which materials are best suited to a specific application.

For any project in which issues may create widespread or serious problems, you'll need a consultant with much greater breadth of knowledge to identify and plan for failures and stop gap measures. Understanding how different systems interface, predicting and preparing for system failures, and having general knowledge of materials employed for varied applications is the job for a consultant with a greater breadth of experience.



Education vs. Experience

Also known as theory vs. real life practice.

They both have a place at the table, but experience often comes with an increased ability to know which areas of plan execution are most likely to encounter problems.

Education and a solid grasp on theory can allow for alternate ways of viewing a problem and creating nontraditional solutions. Having team members with strong academic performance and the ability to propose novel ideas for planning or problem solving is an excellent strategy.

However, for the most complex projects, always err on the side of experience when it comes to finding a consultant. Education is a good foundation, but experience is required to predict failure and safeguard against it.

05

EI and AQ

Not just any experienced consultant will do.

A subject matter expert who lacks the emotional intelligence, or EI, to effectively deliver information and lead a team to corrective action will often fail. Interview potential consultants to determine who has the ability not only to identify issues, but also the inherent skills to deliver information in a way that secures buy-in from the team.

You need a leader-expert, not just an expert.

AQ, or adaptability quotient, is vital as well because rarely will any project go according to even the best-laid plans. Having a consultant with the ability to assess changing circumstances in real time and pivot accordingly is vital to maximize the investment you're making in their expertise.

06

Foresight and Integrity

Any consultant who is worth his or her price tag will have the ability to predict potential issues and create flowcharts for alternate pathways. Little time or funding will be wasted scrambling to understand what went wrong or having to research solutions. They will have identified and planned for potential failures and corrective actions in advance.

They will also accept their own fallibility and actively review and challenge their plans to identify potential challenges and planned diversions in the course of action with the team.

A consultant with the perfect blend of confidence and integrity will ensure you found a trusted advisor who knows how to predict, survey for, identify, and correct mistakes...even their own.

07



Teaching and Training

The best consultant won't simply tell you where you went wrong and how to fix it...

They will teach you how to identify the cause and how to create the solution.

To get true value from your consultancy investment, choose someone with a proven track record for teaching and training teams to better understand their industry and how to identify and solve problems.

Grow your team's skillset by choosing a consultant with a mentor mindset and commitment to others. Creating strong teams that can lead themselves in a consultant's absence should be part of any consultancy plan.

True confidence doesn't let ego get in the way of mentoring others. Sharing knowledge and teaching skills should be a requirement of any consultant you hire.

08

Stakeholder Buy-In

Once you have vetted and interviewed potential consultants, if you're having trouble with stakeholder buy-in, let the consultant sell him- or herself.

Set up a meeting or interview for stakeholders to meet and discuss project goals and budget with your chosen consultant. The right consultant will often be able to answer questions and address concerns while also discussing past performance and project rescues that could have come in at budget if consultancy was used at the planning or initial implementation stage.

Direct communication between a potential consultant and key decision makers is often all that is needed to move forward.

09



Finding the Right Consultant



Steve Heffler, PMP
sheffler@orbitalpm.com



559-515-3840



Steve Heffler, PMP
Resume

In addition to executive management , we provide consulting in the following areas:

- Database Management
- Green Belt Manufacturing/Lean Practices
- Utility Infrastructure Programs and Projects
- Safety

Case Studies



▶ **BACKGROUND: Strategic Undergrounding**

In an effort to stave public safety power shut-offs located in rural areas prone to wildfires and to restore positive customer relations, a major southern California utility initiated a pilot program to underground electric distribution power lines. A design and engineering firm was tasked with contributing towards their 2020 goal of 20 miles.

▶ **CHALLENGE**

Because the location to underground was exclusively rural, coordination between agencies became the critical focus to remain on schedule. Each circuit would require permitting, land rights, an environmental study, a geotechnical report, geospatial imagery, Powerline System CAD modeling, underground utility location markout and potholing, as well as face-to-face customer relations management. In addition to managing the timely coordination of each external service, the need for the internal coordination of electric and civil design for a unified design was also apparent. Scoping method improvements and aggressive timelines were identified.

▶ **SOLUTION**

Orbital Project Management mapped processes, developed a RACI chart to communicate functional responsibilities, centralized the data collection location as well as streamlined its collection methods, and improved overall communications so that dashboards and real-time reporting could be implemented for better decision-making within the design and engineering firm. In addition, planning and scoping improvements were made so that clear expectations could be communicated to the utility client for better schedule adherence. The data collected was then fed to the utility for internal KPI tracking towards mileage goals.

▶ **RESULT**

The design and engineering firm supplied 21.7 miles of the 20 mile goal target in 2020 three months ahead of schedule, thus securing its position as the go-to design and engineering firm for the utility's Strategic Undergrounding Program for the next 5 years. In total, over **86 miles** of design and engineering services were managed in converting Tier 3 and Tier 2 electrical distribution power lines to underground services since 2020.

Case Studies



▶ **BACKGROUND: Drone Inspection, Assessment, and Remediation**

In an effort to identify fire risk related issues in the High Fire Threat District that could contribute to wildfires, a major southern California utility initiated a program to fly drones in the highest risk areas and where agency and customer relationships were in need of substantial trust improvement. These flights record images, geospatial data that are reviewed real time by a Qualified Electrical Worker (QEW - Lineman) used to identify potential hazards in the system. These issues are prioritized as Emergency or Non-Emergency and Non-Emergency issues are further classified to Engineering or Non-Engineering. Orbital Project Management was tasked with program managing all aspects of the program from Flight planning, issue classification, engineering and design support, data management and reporting, coordination of environmental, permitting, agency response, access protocol, customer outreach and notification, construction package assemble and readiness, construction tracking, post construction inspection correction and as built tracking and coordination of LiDAR and True Up work associated with all scope identified.

▶ **CHALLENGE**

The existing prime contractor was in month 7 of their contract and experiencing significant performance issues. The utility client was prepared to terminate the agreement and move to a new provider. The prime contractor reached out to Orbital and requested Steve Heffler consult with them and meet with the Client at the utility in an effort to course correct. Within weeks a contract was in place for consultant support and program management. Steve was able to begin immediately working the prime contractor resources, providing leadership, training and mentoring to their staff, reassuring and improving communication with the client, identifying immediate needs and implementing corrective actions while strengthening the team and their confidence in their ability to provide the required services.

▶ **SOLUTION**

Within weeks a contract was in place for consultant support and program management. Steve was able to begin immediately working the prime contractor resources, providing leadership, training and mentoring to their staff, reassuring and improving communication with the client, identifying immediate needs and implementing corrective actions while strengthening the team and their confidence in their ability to provide the required services.

▶ **RESULT**

By month 3 of consulting the program was back on track, the engineering teams had the right tools and staffing to meet critical timelines, dashboards and reporting tools were stood up and have been accurately used to support all program objective decision making. Additionally, team members were cross trained and the entire team is prepared to do any job asked of them. The client was not only satisfied, they extended the contract for an additional year immediately. The prime contractor has also been awarded another large scale 9 year contract to provide PMO services for a major project.

Case Studies



▶ **BACKGROUND: Executive Staffing**

In an effort to unify the staff of an engineering and design firm's many acquisitions and mergers in order to reduce the attrition rate and improve employee engagement, Orbital Project Management was hired to consult and fill the role of Senior Vice President of Electrical Operations.

▶ **CHALLENGE**

Because the firm continuously purchased other companies without a system to integrate, the lack of policies and structure allowed newly-acquired employees to get lost in the shuffle and ultimately search for new employment. Many new and old employees were unsure of who their management was due to a lack of organizational hierarchy and documentation. Communication channels were blocked due to a lack of trust between departments, and collaboration was at a minimum due to poor employee morale.

▶ **SOLUTION**

Steve integrated the team, assisted with career development, and provided leadership support to improve team building and morale across the company. With his creation of a continuously updated organization structure and the implementation of biannual reviews, bonus awards, and quarterly town hall meetings for employee introductions and recognition, employee retention and job satisfaction were much improved. In addition to establishing this solid approach to human resource challenges, Steve also served as SVP of Electrical Operations during which he developed and implemented project management tools as well as automation to collect more than \$20 million in unpaid or overdue invoices for the engineering and design firm.

▶ **RESULT**

Steve served the term of his contract and although he decided to pursue the next challenge, the engineering and design firm still attempted to hire him directly in an executive role to continue the trend of significant improvements recognized during his tenure.



OPM Consulting

Steve Heffler is a certified program management professional and OPM's lead consultant. His keen ability to rapidly assess energy project design and failure points and create sustainable solutions sets him apart from other consultants. His enthusiasm for team building and training ensures that the projects he advises on are left with a well-prepared staff who are equipped to see projects through to completion.

Before joining Orbital Project Management, Steve was a senior project manager at Cordoba Corporation. He also held a variety of project and operations roles at Southern California Edison, Entergy Nuclear, DTE Energy, and Exelon Corporation.

With vast expertise and experience, Steve has successfully completed more than 300 major infrastructure improvement projects valued at over \$2 billion for the San Joaquin Valley power grid.

During his military career, Steve served as a leading chief petty officer, assistant command duty officer, and a nuclear instructor. He has received numerous awards and recognitions including six Navy and Marine Corps Achievement Medals.

He earned a Bachelor of Science degree in Interdisciplinary Studies from Grantham University, Kansas where he graduated magna cum laude.

14



For more information on professional service offerings from Orbital Project Management

Connect with us:



www.orbitalpm.com



<https://www.linkedin.com/company/orbital-project-management-llc/>



www.facebook.com/orbitalpm



2801 B Street #3041
San Diego, CA 92102

2721 Jennifer Drive
Brighton, MI 48114



Jennifer Heffler, CEO
jheffler@orbitalpm.com

Link to all marketing materials:



15