Graded Case Study 1, Part II

Initiating

When Feinberg and his senior management team reviewed the list of proposed projects, they were pretty convinced that they should pursue the industrial lighting retrofit project, to take advantage of current programs offering tiered incentives on kWh reductions. For Feinberg, this project seemed like "low hanging fruit" when it came to energy savings for the company.

Feinberg and Scott spoke with Sam Massoni, the program manager for American Grid, to learn about the utility's lighting retrofit program, including incentives and program requirements. After that, they assigned an internal project coordinator, Vivian Liu, to serve as the project manager for the initiative.

Liu already had several time-consuming projects on her plate and wasn't eager to add another one, but she knew most of her colleagues were in the same boat. She knew she would have to work as efficiently as possible, while trying not to get bogged down in too many unnecessary steps.

After several meetings with Scott to understand project requirements and scope, Liu created a stakeholder list. Because the lighting retrofit was largely concerned with energy efficiency, she selected the same stakeholders that were included on a recent project implementing GPS technology to remotely monitor idling and fuel consumption patterns of Fabricant's distribution vehicles. For this particular project, however, she added Massoni as an external stakeholder and project consultant. She figured it would be good to include at least one external perspective, as long as it wasn't a negative one. If there was one thing Liu had learned on previous projects, it was that negative stakeholders are incredibly difficult and time-consuming to work with.

Stakeholder List

Name	Role	Interest	Power	Classification
Lee Feinberg	CEO	High	High	Positive
Janice Scott	Strategic Planning	Medium	Medium	Positive
Sam Massoni	Program Manager, American Grid	High	Medium	Positive
Paul Callahan	Distribution Logistics Manager	Medium	Low	Neutral
Transportation Specialists	Truck Drivers	High	Low	Neutral
Elwood Vaughn	Systems/IT Director	Medium	Low	Neutral
Trudy Noble	Environmental Manager	High	High	Neutral
Jeff Salvatore	PR/Communications Manager	Medium	Low	Neutral

When identifying the lighting retrofit project team, Massoni also listed the same team of professionals from the GPS remote monitoring technology project. From what she could tell, these people all had a solid understanding of the cost/benefit economics and environmental impacts of fossil fuel usage and could ensure a successful outcome.

Project Team

Vivian Liu	Project Manager
Sam Massoni	Program Manager, American Grid
Paul Callahan	Distribution Logistics Manager
Elwood Vaughn	Systems/IT Director
Trudy Noble	Environmental Manager
Perry Silverman	Finance Analyst

Jeff Salvatore	PR/Communications Manager
Emmitt McAuley	Occupational Safety and Health liaison
Matt Stevens	Strategic Planning Assistant

Because most of the project team members had worked together on the GPS technology project and others like it, Noble suggested that they review the lessons learned they had captured at the conclusion of the last project. Others concurred, but Liu did not believe those lessons needed to be considered, especially with so many other things to do to get started. "I think we all know where things got off track the last time. I'm sure we won't make the same mistakes again. Besides, we'll have a consultant from American Grid helping us out this time."

Liu's next step was to establish the project's boundaries and to communicate clear acceptance criteria to the project team and stakeholders. She engaged Mitch Cyterski, Fabricant's Head of Facilities, and several of his staff to identify the project's acceptance criteria because they had the functional knowledge pertaining to all facilities' infrastructure and operation, including lighting systems.

Acceptance Criteria:

- Replacement of all metal halide and T-12 fluorescent lighting fixtures with energy-efficient options
- Installation of sensors in all offices, warehouses, production facilities, and break rooms
- Baseline computer simulation model to measure and verify ongoing energy savings from the project
- Life cycle cost analysis and economic evaluation for each new fixture
- Documentation of maintenance standards

After Liu shared the stakeholder list and acceptance criteria with Feinberg and Scott to solicit their input, she took a moment to check her email. There was a message from Ken Simmons, one of the production foremen, relaying complaints his staff had about the upcoming lighting replacement work in their area of the shop floor. They did not want to deal with the mess and disruption that this was going to cause, especially where there didn't seem to be anything wrong with the existing lighting. Furthermore, they were unwilling to work any overtime hours to catch up on lost shift productivity. Liu had already heard similar complaints from other people about the project so she decided to skip her lunch break and take the time to draft her own replies to Simmons and other "negative" constituents in order to refute each individual complaint.

Before you move on to the next section of the case study, identify the problems and/or issues that you'll need to include in your analysis. Document this information, and consider how you will integrate it into your evaluation of the project.