

## **CQ Case Study:**

### **Workforce Planning and Peer Mentoring in a Maintenance Organization**

#### **Change Challenge**

A major oil refinery lacked a strategic plan for its provision of a maintenance workforce. Virtually all of the existing 350 maintenance technicians were projected to retire within 10 years, and the leadership team was unsure as to which of two general strategies to pursue. The first, initially preferred strategy was to let the technicians retire without any attempts to hire or train replacements. This strategy would rely on contractors to eventually perform all maintenance in the 2500-employee refinery. The second strategy was to hire and train new employees. Essentially, this strategy would require that the company develop and implement apprenticeship programs. The leadership team did not know how to proceed and did not have the data to make decisions.

#### **Customized Solution**

To facilitate data-based decision-making, we performed internal and external research of best practices in maintenance workforce planning, including sources internal to the firm, throughout the industry, in other industries, and from academic and governmental sources. Based on this information, we facilitated a joint union-management team to develop various business models and solutions. Together, we built a 10-year outlook, identified 35 key business variables (with metrics), and delivered to the refinery leadership team a template that would allow them to make an informed decision. In the end, the solution was made to develop apprenticeships for four critical craft lines. We continued to consult with the union and management team members to plan the change process in each craft. A key element in the solution was an innovative mentor system for the hourly workforce. Through this mentor process, senior craftspersons mentor their junior peers, imparting technical knowledge as well as behavioral "tools of the trade" for success in an inherently hazardous industrial environment. The process includes involvement by craft supervisors, planners, and training advisors. Taken together, we crafted and coached the client to intentionally manage a comprehensive approach to talent management and succession planning at the front line level.

#### **Real Results**

The new craft training program was a multi-million dollar investment for the refinery. Nevertheless, business unit leadership realized greater return-on-learning investment due to the knowledge transfer from departing workers, the relevance of the developmental process to performance expectations, and positive impact on work unit effectiveness. The maintenance organization as a whole reports enhanced workplace relationships based on peer and supervisor participation in the learning process. The union is actively involved in and supportive of the process, and its leaders believe the tools directly impact safety and help keep jobs in-house. In terms of the mentor system specifically, over a five-year period several hundred veteran craftspersons received a series of workshops to enable them to mentor their new peers. Similarly, the mentees also received training to set clear expectations and to give them the skill to request and accept feedback, and on a variety of communication, interpersonal skill, and teamwork topics. Currently, nine apprenticeship programs are using the mentor model and training to develop new craftspersons and to transfer knowledge and skill from experienced journeypersons to mentees. To date, over 120 employees have graduated from the craft training programs to a full-rate status. Significantly, the "brain-drain" was reversed.