

JOE KNOWS

TALENT | TECHNOLOGY | SOLUTIONS

INSPECTOR AND CM WORKFORCE DEVELOPMENT

Utilizing Human Factors Technologies
to Drive Performance Improvements

DAN LORENZ

THE CHALLENGE



INCREASED REGULATORY
OVERSIGHT



INCREASED VERIFIABLE
FIELD RECORDS



DEGREES OF
SEPARATION



INCREASED INSPECTION
DEMAND



COMPETITION FOR
INSPECTORS



CONGESTED
SUBSTRUCTURES



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THREE FUNDAMENTAL TRUTHS

High Performance =
People + Process + Tools
(IN THAT ORDER)

People are Hard

Challenge
Be Accountable and
Transparent

Comprehensive Program that Supports Accountable and Transparent Culture



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CASE STUDIES



DOUBLING INSPECTION TEAM

National Grid Complex Projects



IMPROVING EXISTING TEAM

CHGE



BUILDING NEW TEAM

UGI Utilities



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FOUR HUMAN FACTORS



Attraction, Identification, and Selection



Support, Training, and Development



Reinforcing Behaviors Using Rewards



Technology to Increase Efficiency and Effectiveness



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ATTRACTION AND SELECTION

- Attraction – Culture
- Benchmarking High Performance
- Platform that allows for ease of access and matching to teams.
- 4D report that looks at candidates in 4 different ways



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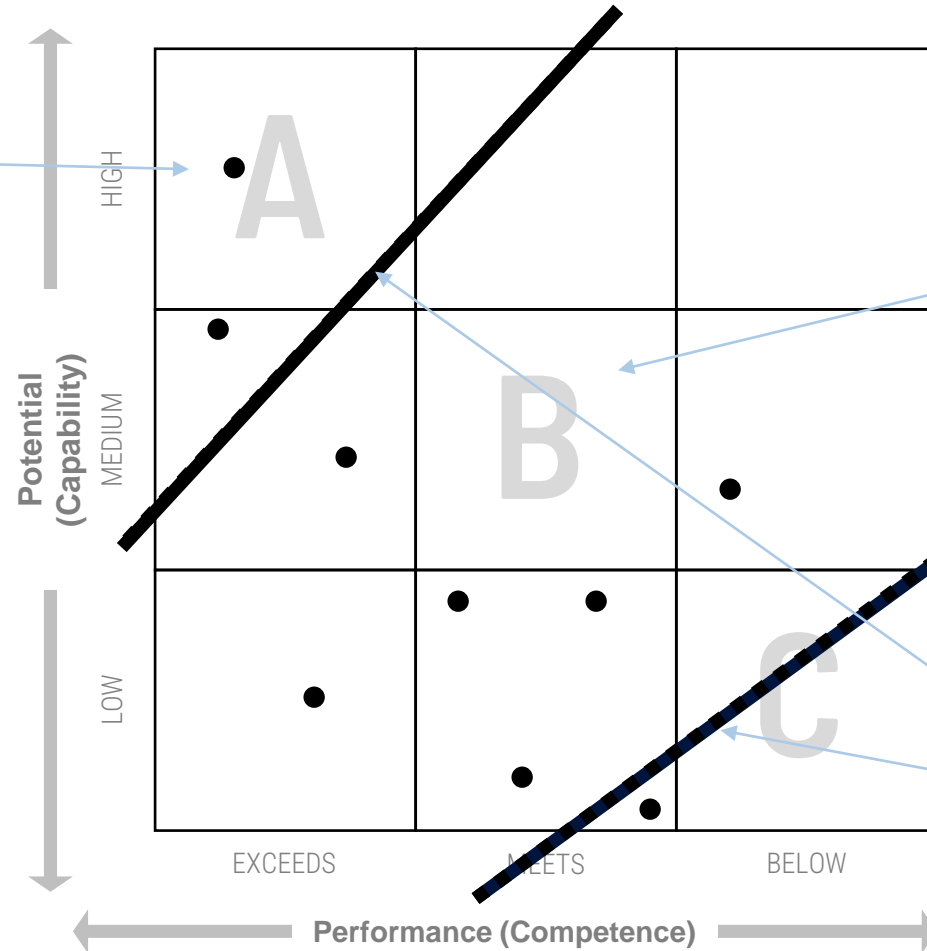
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HIGH PERFORMANCE CONDITIONS

20% of Management Time Available "A" for Career Planning.



80% of Management Time Available "B" for Training.

Bars can now be raised at a rate consistent with the growth in ability of personnel.



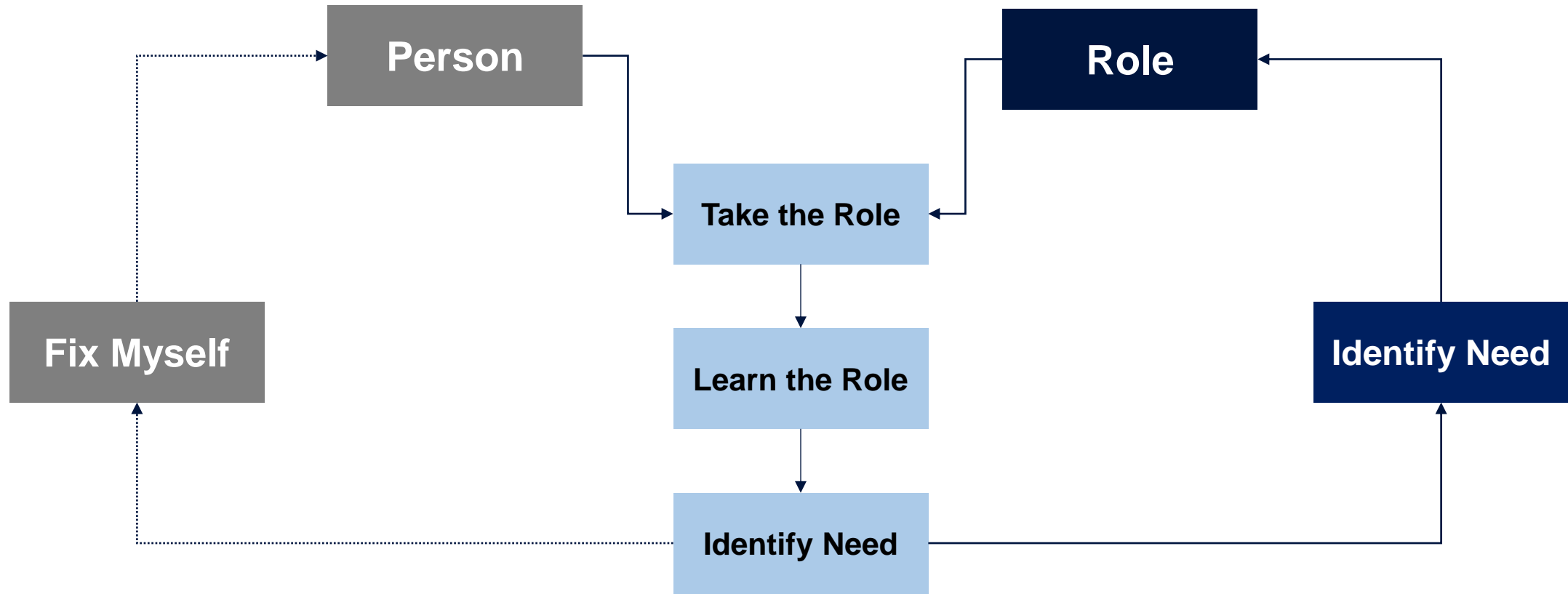
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TURN RIGHT MORE THAN LEFT



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TURN RIGHT MORE THAN LEFT

HOW
DISC INDEX

WHY
DRIVERS AND MOTIVATIONS

WHAT
ATTRIBUTE INDEX



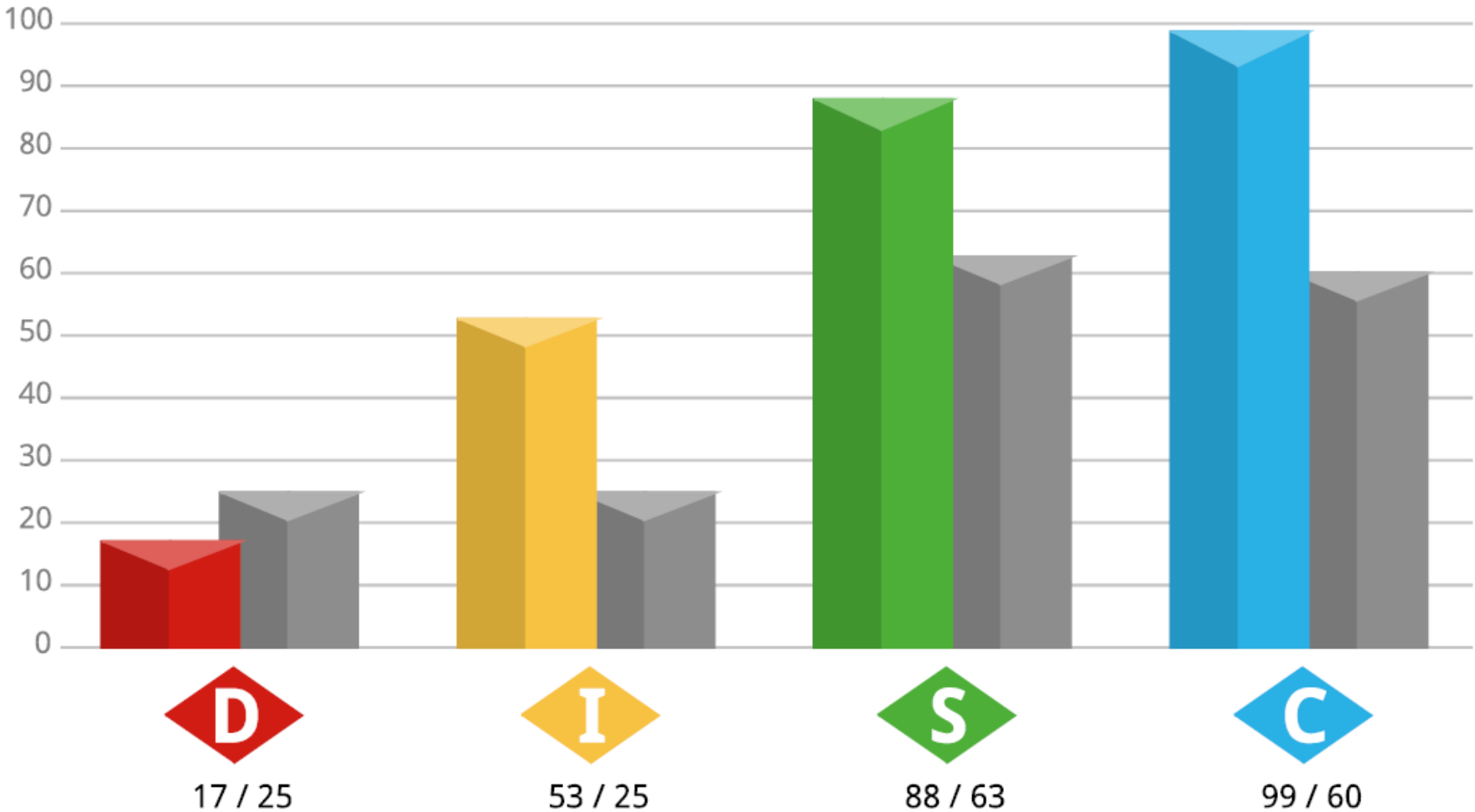
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DISC PROFILE



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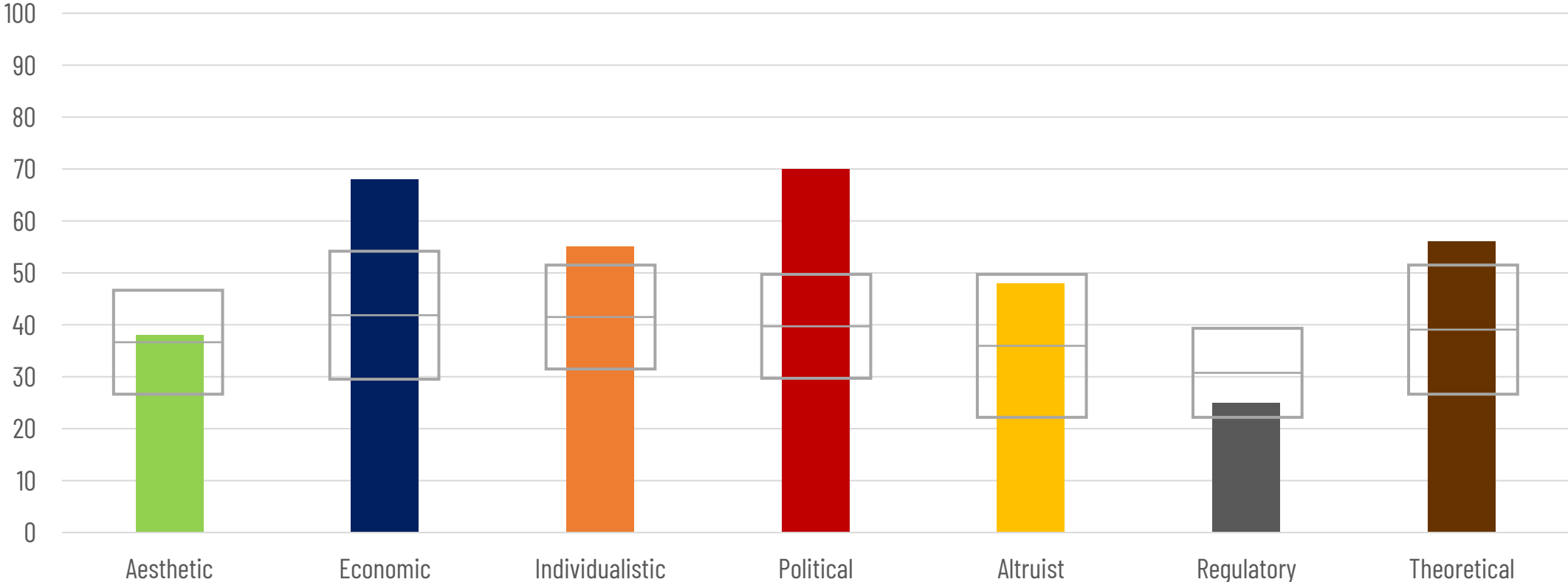
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HIGH PERFORMING MOTIVATORS

Executive Summary of Values



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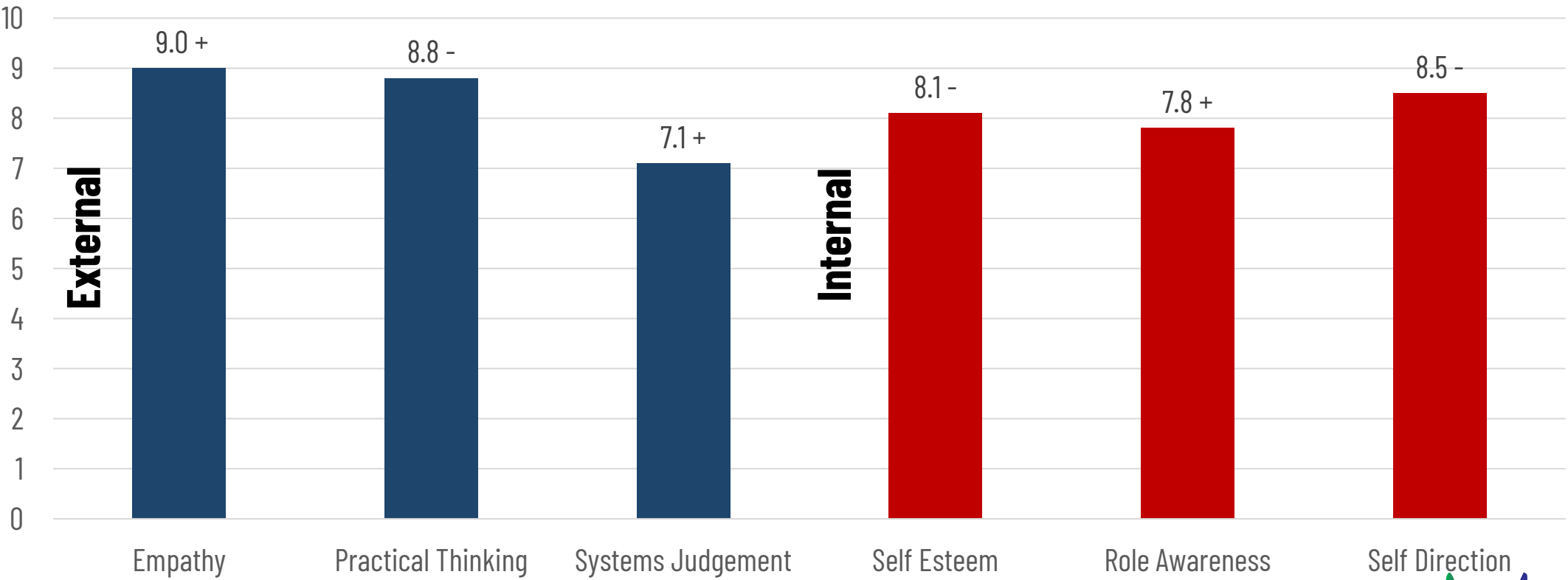
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INSPECTOR ATTRIBUTE INDEX

Dimensional Balance

0.94 / 0.86



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SUPPORT, TRAINING AND DEVELOPMENT

- Define Your Culture
- Define Your Expectations
- Provide Frontline Transformational Leadership
- Train with Passion and Clarity Content



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DEFINE DESIRED WORKPLACE CULTURE

Define Your Desired Culture
with a Focus on a High-
Performance, People-First
Approach



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ELEMENTS OF CULTURE



COMMUNITY

- Shared Values
- Shared Purpose
- Communication
- Collaboration
- Environment
- Performance



LEADERSHIP

- Vulnerability
- Communication
- Accountability
- Leadership Style
- Recognition and Feedback
- Performance



PERSONAL

- Clarity and Accountability
- Interpersonal Relationships
- Support and Resources
- Belief in Values
- Ideas and Feedback
- Performance



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WORKPLACE CULTURE TRAITS

UNHEALTHY

Lack of Engagement
Working in Silos
Lack of Trust and Respect
No or Ineffective Communication
Minimal Collaboration



HEALTHY

Highly-Engaged People
Cross Team Support
Trust and Respect
Open and Effective Communication
Collaboration and Shared Ideas



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HOW HEALTHY IS YOUR CULTURE?

STATEMENT

T

F

I feel free to share my thoughts and ideas without fear of criticism.

I receive encouragement and support from my manager and peers.

My team members and I clearly communicate values, vision, & strategy.

Our leaders share gratitude & appreciation consistently and publicly.

We often assist and share resources to help each other achieve goals.

My team members and I embrace change rather than resist it.

My manager and leaders are willing to be vulnerable and ask for help.

Everyone is accountable for mistakes or issues without excuses.



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WHY, HOW, AND WHAT



WHY

We believe in the potential and impact of frontline professionals.



HOW

We utilize our proprietary High-Performance People-First Program to develop the best talent.



WHAT

We are committed to helping our clients elevate their culture while meeting KPIs.



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TEAM LEADERS

FRONTLINE TRANSFORMATIONAL CULTURE LEADERS

Team leaders are key to performance and culture. They reinforce inspector behavior and accountability in the field. This role includes supporting inspectors in the field with day-to-day issues.



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INSPECTOR JOB CHART SAMPLE

Role of Position	Task 1	Task 2	Task 3	Task 4	Task 5
A. Safety	Be an example of the safety culture we are helping to build.				
B. Training / IDP / PLG					
C. Pre-Job Planning					
D. Inspection / Reporting & Documentation					
E. Communication / Managing		Communicate ongoing status of work – actual results vs. planned and facilitate adjustments.			

SAMPLE



SAMPLE COMPREHENSIVE DEVELOPMENT TOOL

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Performance Leadership Guide

[Learn How to Utilize the PLG Here](#)

Client

Date

Thursday, April 11, 2024

Inspector Name

Evaluators

Qualifications and Development	Level 1	Level 2	Level 3	References
Industry OQs/Certifications (Written vs. Hands-On) 1. Entry Level: 2. Proficient: 3. Expert:				
Company Specific 1. Entry Level: 2. Proficient: 3. Expert:				
JKE Specific (Values) 1. Entry Level: 2. Proficient: 3. Expert:				
Written Communication	Level 1	Level 2	Level 3	References
Safety 1. Entry Level: 2. Proficient:				
Daily Reporting Requirements 1. Entry Level: 2. Proficient:				

SAMPLE



REINFORCE DESIRED PERFORMANCE WITH REWARDS

Intrinsic rewards

- Recognizing publicly their success
- Provide real-time feedback on their performance
- Involving them in the client relationship development

Extrinsic rewards

- Share in a leadership incentive compensation pool
- Providing them insight as what drives the incentive pool and how they can impact it



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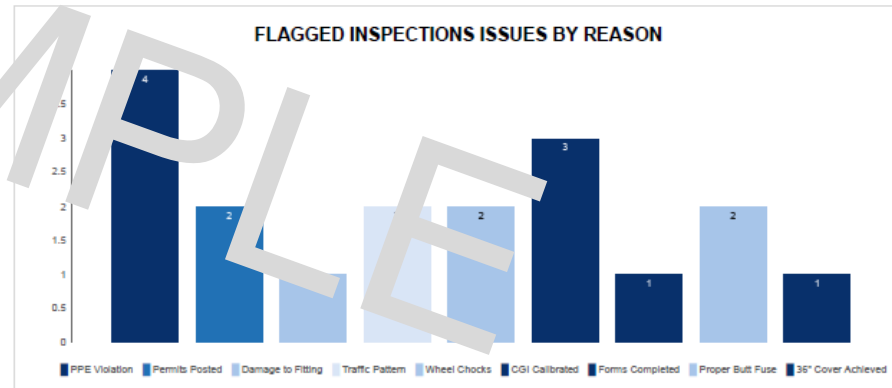
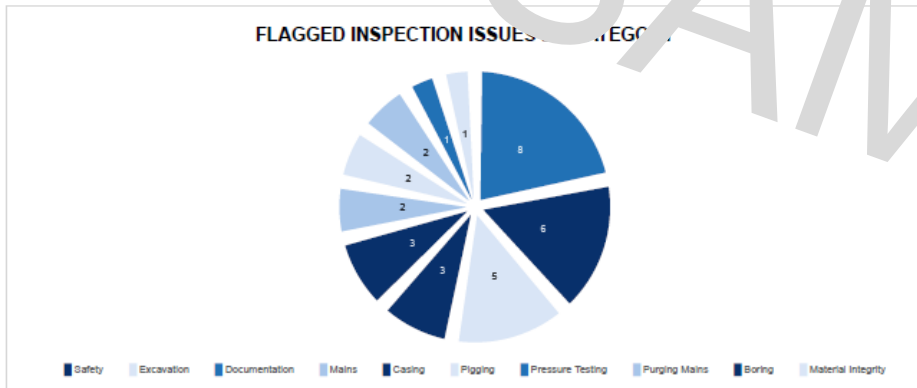
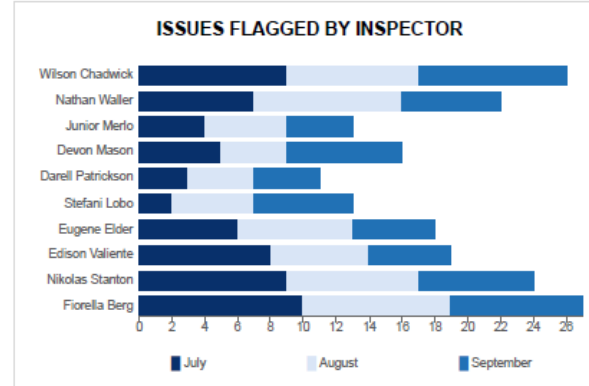
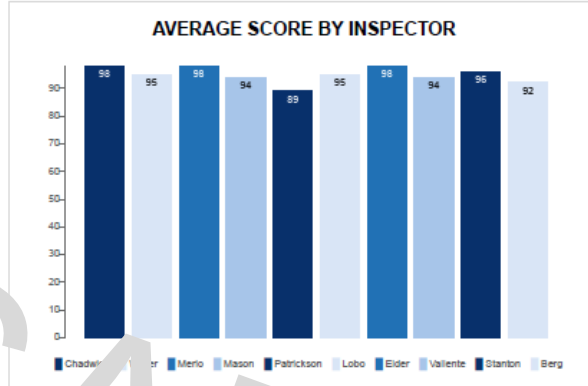
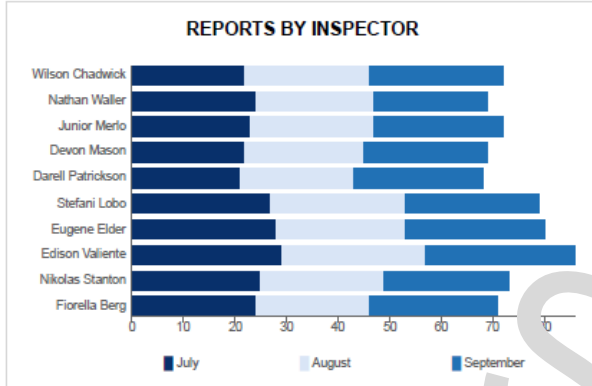


ACT REPORT SAMPLE

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MONTHLY INSIGHT REPORT

CLIENT | REGION | 10/01/23



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TECHNOLOGY TO INCREASE EFFICIENCY AND EFFECTIVENESS

- Machine Learning – Various Assessment Tools
- Platform – JKE Inspector Database
- Crowd Source – Match in Realtime



RESULTS



Doubling Inspection Team (NG CP)

100% Retention in 9 Months



Improving Existing Team (CHGE)

100% Retention over 2 Years



Building New Team (UGI)

95% Retention over 2 Years

JOE KNOWS ENERGY

nationalgrid



Orange & Rockland



Energy to do more®

“Joe Knows Energy is changing the industry, by providing inspection professionals who fit the culture, are accountable, and integrated with the team.” -Todd Lakatos, Director of Capital Construction, UGI

“JKE's level of engagement with the Orange and Rockland leadership team exceeds their competitors. Their effort shows their commitment to developing a successful transparent relationship.” –Mike Thompson, Section Manager, O&R

“JKE provides up front vetting and ongoing support that has led to much higher retention of talented inspectors than we have experienced with other staffing firms.” –Tom Decina, Director of Complex Construction, NG



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SUMMARY: HUMAN FACTORS TO DRIVE PERFORMANCE



Attraction, Identification and Selection



Support, Training and Development

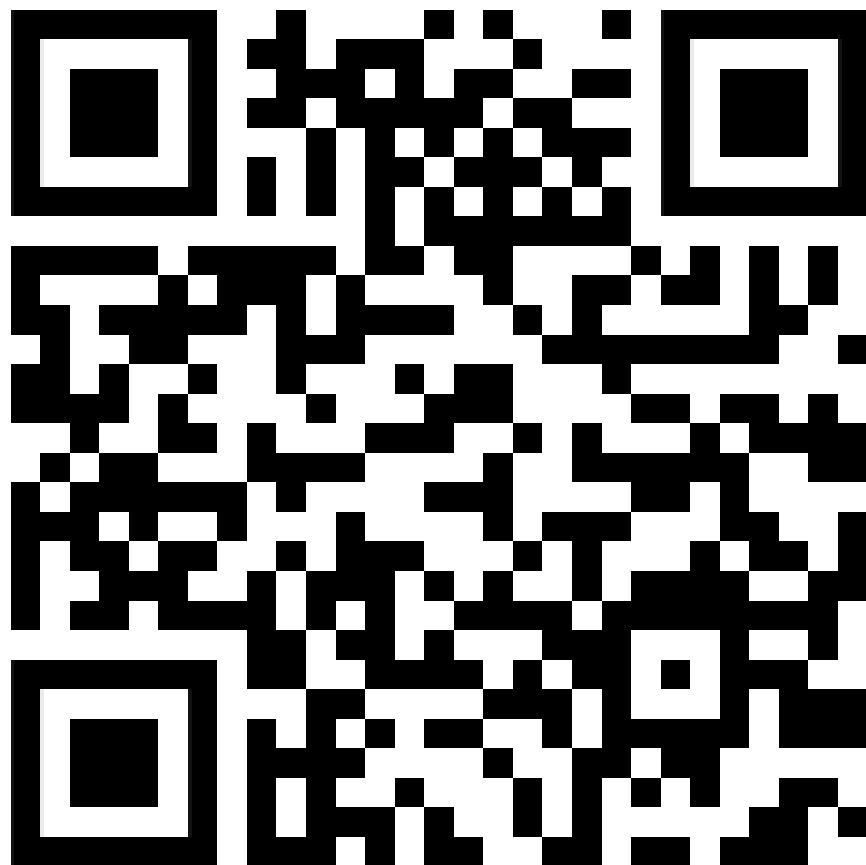


Reinforcing Behaviors using Rewards



Technology to increase efficiency and effectiveness





Scan the Code
Take a Brief Assessment

MY CONTACT INFORMATION

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