

## INTEGRATED TEAM DECISION-MAKING: FLOW & STRUCTURE

**Integrated Lean-informed governance and decision-making framework**—centered around structure, accountability, education, and value. Let’s break this into what you need:

**\*\*No matter if you use Lean tools (A3 or CBA – Choose by Advantage) or any other decision-making tool, you must establish a clear, validated, informed, holistic, and accountable process / flow/ and why framework.**

**Your “Team agreed upon” (Required elements of a decision) must be on the Big Room wall** for reference. Don’t skip the steps and don’t fall into knee-jerk decisions. Innovation is driven by holistic thinking and driving win/win moments.

### **Flow, Process, and Structure for Decision-Making and Recommendation**

#### **1. Trigger/Event**

**What initiates the need for team evaluation and leadership recommendation?**

- Introduction of a prefabrication opportunity
- Clash in scope or ownership between divisions (MEP vs structure vs interiors, etc.)
- Need for schedule realignment or coordination across workstreams
- Material/system selection with cross-trade impact
- Technology, process, or tool change with operational impacts

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### ◆ 2. A3-Based Decision Intake Form (Standardized)

Create a **decision request template** (A3-inspired) used by anyone who wants to initiate an evaluation. This is the anchor of shared understanding.

#### A3 Decision Request – Required Fields:

Section	Description
Current State	What is the situation now? What problem/opportunity is being addressed?
Desired Future State	What is the proposed outcome or direction?
Drivers/Reasons	Why is this needed? Tie to cost, quality, safety, schedule, flexibility, etc. (Impacts to two critical paths – on-site / off-site)
Stakeholders	Primary (core trades, ops, design, owners), Secondary (affected indirectly)
Impacts Across Trades	Cost, schedule, constructability, risk, maintenance, flexibility
Visuals or Data	Floor plan, shop drawing, mock-up photo, case study, etc.
Initial Recommendation	What's the team's gut recommendation (preliminary)?

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### ◆ 3. Structured Team Review Meeting (Core + Extended Team)

**Core Team leads**, but **cross-functional reps** are invited based on stakeholders listed in A3. This review happens on a cadence (bi-weekly or monthly, depending on project rhythm).

#### ✓ Review Structure:

1. **Presenter** walks through A3.
2. **Each Stakeholder Division** gives voice (impact + concern).
3. Team uses a **scoring matrix or color scale**:
  - Cost (+/-)
  - Schedule (+/-)
  - Risk (↑/↓)
  - Operational Impact (↑/↓)
  - Long-term value (Y/N)
4. **Debrief and Identify Gaps**: What's missing to finalize this decision?

### ◆ 4. Team Recommendation + Learning Summary

After stakeholder input, the **core team finalizes a recommendation** and sends it to the **Steering/Leadership Team** in a summarized form.

#### 📄 Summary Document Includes:

- Final A3 (updated based on review)
- Scored impact table
- Clear team recommendation with rationale
- Open questions or risks

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- Next steps

### ◆ 5. Leadership Team Decision

Leadership's role is not to re-debate but to:

- **Validate** that cross-functional review occurred
- **Assess strategic alignment** (brand, lifecycle, client vision)
- **Approve, Reject, or Defer** decision
- **Assign action steps**

### ◆ 6. Capture + Memorialize (Learning & Process Feedback)

After the decision:

- Add final A3 to a **Decision Log Database**
- Send **Learning Snapshot** to all project team members (e.g., “Why we chose X prefabrication strategy”)
- Add key decision to **turnover package** and **lessons learned book**



## Core Principles Behind the Structure

- **Transparency:** Everyone sees the same inputs and has a voice.
- **Respect for expertise:** Trades, designers, builders, operators—everyone is heard.
- **Lean Thinking:** Reduce rework, remove waste, increase value.
- **Documentation:** Memorialize to create a project “memory.”
- **Continuous Learning:** Each decision builds capability across future teams.

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### Roles and Expectations

Role	Responsibilities
Initiator	Fills out A3, triggers review
Core Team	Hosts decision review meeting, facilitates cross-functional dialogue
Stakeholders	Participate, offer impact statements
Leadership Team	Validates process, makes final call, allocates resources
PM/Project Ops	Executes decision, updates milestone plan
Learning Lead / Ops Coach (if available)	Captures outcomes, integrates into future training or templates

### Optional Tools to Support Process

- A3 Template in Notion/OneNote/SharePoint
- Visual Impact Score Matrix (color-coded table)
- Decision Log Database (Notion or Excel)
- Monthly Learning Review Slide (5 min, share with all project staff)