

Project Support Services for an International Utilities Company

BACKGROUND

Shea Writing & Training Solutions was contacted by the Client initially to provide technical writing and editing support, primarily taking meeting minutes for internal meetings and also meetings involving multi-level executives, external stakeholders, and government regulators (including FERC).

As construction progressed, internal documentation and project support needs evolved. Shea was given the opportunity to increase the level of service provided to the Client, and broaden its scope of work. Shea expanded its footprint to facilitating meetings, interacting with higher level executives, preparing presentation decks, and providing formal document control support. Shea's input met critical client needs by keeping meticulous records for multiple departments, making recommendations for increased database efficiency, and working with external vendors to improve processes. Shea quickly developed an understanding of established workflows, pinpointed needs, and identified improvements to processes and protocols. Shea facilitated engineering reviews, working to streamline communication and successfully meet tight deadlines.

SERVICES PROVIDED

Initially, Shea provided the following services:

- ◆ Scribing and editing of meeting decisions and action items

In March 2022, the scope of Shea's provided services was expanded to include the following:

- ◆ Document control
- ◆ Meeting facilitation
- ◆ Project management support
- ◆ Capturing existing process workflows and revising them to improve efficiency
- ◆ Advising functional groups on documentation process improvements
- ◆ Creating PowerPoint presentations and Visio organizational charts
- ◆ Scribing for highly confidential meetings and creating follow-up action lists
- ◆ Developing a Document Control standard operating procedure (SOP), including hyperlinks to document storage
- ◆ Serving as the central point of contact between the client's engineering department and external contractors, for critical engineering document review
- ◆ Maintaining detailed document review logs and critical response dates

CHALLENGES

- ◆ Use of multiple Excel logs external to the storage database
- ◆ Lack of formal in-house document control database resulted in cumbersome document review
- ◆ Lack of written SOP for document control role

RESULTS

- ◆ Incorporated input of document metadata to allow the database to function as the log, reducing the need for external spreadsheets, and facilitating data export only as required for external review
- ◆ Expanded the use of an existing database to enable at-a-glance documentation review, and immediate assessment of responses needed
- ◆ Created a document control SOP for use across the enterprise as a basis for other projects

Shea has created a reputation for dependability and expertise by consistently being available to provide assistance as client needs expand.