Opportunity Framing for Technology Projects

Consultant / Trainer:

Andreas Nowak

Framing is the process of defining premises of an opportunity at the start of any project. The **Petrogenium.** Opportunity Framing for Technology Projects workshop focuses on technology opportunities. It is a facilitated, structured process involving the key players driving the opportunity and external experts, where required. The premises document remains 'live' for the duration of the project and should be updated during all stages of project development. It ensures that all project members are aligned and will help in on-boarding new project members. A summary of the premises forms an overview of the opportunity for management. This course can also be used to train future framing facilitators in–house.

Participants

Although many **Petrogenium.** courses can be tailored for awareness/inexperienced staff, for intermediate and for experienced personnel, this workshop is specifically for more senior leaders and project staff and will be customized for a specific refinery, plant or unit. The option for post-course consultancy/help-desk support is also available.

This **Petrogenium.** course can be tailored as follows:

a. explain the elements for good project premises and the best way to hold the sessions required (1/2 day)
b. same a) using an example relevant to the client and capture the basis for framing (1 day)
c. same as a) by facilitation of a framing session on an actual opportunity (2-3 days, depending on the opportunity)
d. same as c) plus the draft Premises Document by **Petrogenium.** consultant (2-3 days plus 2 days consultant time)

Participants would be future facilitators for option A. For the other options, selected project staff for B, a team representing strategy, Technology, Operations and Maintenance, Safety and Environment, Finance as many areas mentioned below as possible for options C and D would be present.

Participants may include: Senior Staff and professionals, members of the site leadership team but also managing (Engineering & Construction) contractors.

Learning Objectives

Participants will learn to describe all angles of an opportunity. They will understand how to work through strategic, technical, operational, economic, legal, safety and environmental aspects of the opportunity:

1. Strategy: fit with company, local, national and international current and long-term ambitions
2. Technical: process technology, proven or new and associated risks to operability, feedstock flexibility, tie-ins with other processes and utilities
3. Operational: control strategy, reliability, maintainability
4. Economic: premises, Capex and Opex estimates, development of economic project indicators (e.g. NPV, VIR) as project progresses
5. Legal: changes in legal framework, regulations, permits (timing, risks), subsidies
6. Safety: process safety philosophy versus process risks, personal safety in execution and operation
7. Environmental: CO2 foot print, energy efficiency in design, emissions, waste

Programme

During the process the team coins the *Opportunity Statement*, a short pitch summarizing the intent of the opportunity. This is followed by defining *Value Drivers, Boundaries, Givens, Assumptions, Stakeholders, Risks* (high-level and the basis for the project risk register) and Opportunities (to improve the project). The final step is the drafting of a *Road Map* for the opportunity. Information is recorded during the meeting in a spreadsheet and can be converted into a Word document or PowerPoint presentation.