

A Leadership Imperative for the Oil and Gas Industry

Tightening the Connection That Optimizes Safety and Productivity

Leadership's choices and the quality of these choices have a tremendous impact on safety and productivity at both the individual and organizational level. Of equal importance to leaders is the clarification of the core leadership values and principles that can have a positive connection to improving the systems and processes that lead to a safe working environment. Committed and skillful leadership drives not only safety and productivity but it also enhances employee development and engagement, thereby influencing the quality of decisions direct reports make in any given situation.

The imperative to safely produce oil and gas is at an all-time high across the globe. By challenging themselves to think of safety and productivity as harmonious and simultaneous concepts that enhance each other, leaders may find that they are able to optimize both. This white paper offers a solution and point of view for utilizing leadership as a catalyst for optimizing safety and productivity while engaging everyone in the process.



“Dad! You are not **actually** going to drive without your seat belt!?” My 14-year-old daughter, Gina, had caught me during a momentary lapse of judgment. My mind had wandered, I was focused on the day ahead of me, and I had shifted the car into drive without fastening my seat belt. I made a poor choice. The issue was not a lack of knowledge or experience. It was not a lack of training. I simply failed to focus and recommit to the specific task at hand—driving Gina safely to school. Thankfully, Gina made a smart, real-time decision and held me accountable. Gratefully, albeit humbly, I followed her leadership, buckled my seat belt, and we went safely on our way.

This simple example illustrates the thrust of this white paper: leadership and its impact on safety. The primary reason injuries occur in any industry, and specifically in the oil and gas industry, is typically due to poor choices that lead to unintended accidents and injuries, and in some cases deaths. The connection between daily performance-based discussion and safe action must be scrutinized and tightened. The tool to create the connection is truth and honesty. Our willingness and ability to seize the moment and engage in timely, honest, and efficient performance-based discussion to influence each other's behaviors can create measurable improvement in results. The epoxy that keeps the connection tight is trust and compassion. Sincerely caring about each other's well-being and our own is not only the means to an end but is an end result as well.

As leaders engage in this discussion, they must stay focused on their passion, values, and expertise—the direct connection between leadership, people, and results. Based on research from The Ken Blanchard Companies® and our experience working with leaders in the oil and gas industry, we've learned much about the leadership challenge of balancing the safety and productivity of each of your people.

The Backdrop: Our Work Environment Today

Working in the oil and gas industry is not unlike operating a motor vehicle—inherently but not necessarily dangerous. Many people go entire careers without a lost-time accident or injury while others experience recurring incidents. Each day requires a high level of competence and renewed commitment from each person to masterfully complete tasks that seemingly become routine. The focus on both safety and productivity must be in rigorous alignment with no lack of clarity. Challenges to this can include the following:

- Pressure to produce is at an all-time high due to the revenue streams at stake and the voracious appetite of world economies to consume our products and services. Meanwhile, the operating pressures surrounding us are thousands of psi and often unseen.
- Diverse work groups, often from different generations and cultures, and sometimes speaking different languages, must work quickly and efficiently together, trusting each other to do their part. Simultaneously, the products flowing through the pipes beside us are highly flammable, combustible, and corrosive.
- Conditions at the wellhead are always changing as pressures and flow rates fluctuate, weather shifts, and crews hand off between shifts. Meanwhile our physical and mental condition changes throughout the day. Our attention drifts, our arms and legs tire.
- No matter what size or strength, the physical body is frail among powerful machinery and structures that are designed specifically to crush and pierce rock and contain flammable liquid and gas in explosive mixtures.

Given these challenges, it is a special person who chooses to engage in this type of work. Organizations in the oil and gas industry form the backbone of commerce, pumping out products that fuel virtually every sector of the global economy. And it is the people on the front line who are in the cross-hair where safety and productivity align.



The Quality of Our Choices

No organization, leader, or individual begins their day with the intent of seeing someone injured. Yet, upon review, the majority of accidents are deemed preventable by the very organizations they occur in. If you believe, like most, that safety is not a random phenomenon, then it seems logical to conclude that the quality of our choices at the individual, organizational, and industry level is at the heart of the matter. The good news in this is that we have direct control over our choices.

People Make Choices—Industry, Organizational, and Personal Values Influence Choices

Proper understanding, prioritization, and balance of motives during the organizational decision-making process are key. Industry oversight can shape leader behavior at the organizational level. Perhaps this is most clear by examining the rapid improvements experienced in the Canadian oil industry, where leaders took hard positions on safety through the years. This is also illustrated in the differences we see in results across markets globally.

To make this more concrete at the industry level, if we were to assess the motivations driving offshore drilling safety reform in the United States today, it is key that the humanitarian motive is represented as strongly as the economic, political, or regulatory motive. Likewise, if we were to assess the primary drivers of technological advances, the aesthetic and humanitarian motive must keep pace with the economic motive. Leaders of progressive organizations across all industries purposefully set out to establish values that guide decision making and, ultimately, behaviors. While there are numerous methodologies applied, it seems that the end result of these efforts yield a finite set of results. Within the context of a well-defined mission, vision, and values statement for the organization, many scenarios are evident.

1. Safety is defined and articulated in strategic messaging as a singular core value and rank ordered among other core values as the number one priority in making choices.
2. Safety is defined and articulated in strategic messaging as a singular core value but not rank ordered among other core values as the number one priority.
3. Safety is not singled out and articulated as a core value in and of itself. Instead, Safety is fused into other core values such as Integrity, People, and Relationships.
4. People are defined as the single most important strategic area of focus in the business. Safety of the people is rank ordered as the single most important critical business outcome among others such as Profit, Productivity, and Growth.
5. For a select few specialized companies, the safety of the people in their industry is the Mission and Core Purpose.

Each approach inherently has merits and flaws. It would seem the most effective approach would be the one that provides the greatest day-to-day clarity for all involved. Simply put, none of the strategic approaches listed above gets the job done without rigorous alignment of organizational processes and resources to support people's performance. An approach that seems to incorporate the best of all approaches specifically places people's full engagement as a means to achieving all critical business outcomes while at the same time supporting and holding each person accountable for their best in each outcome. Regardless of the form the

mission and values statement takes, the process of discovering and communicating mission and values demands that the voice of many is distilled down to one clear voice that all will follow.

The primary cultural connection that leadership influences through mission, vision, and clear values is the working relationship between people. One of the ways we gain insight into the organization is by observing what the team norms are when the supervisor is not around. What are the rules, both spoken and unspoken, that define “That’s how we get things done around here”? These norms are guided largely by a company’s rank-ordered, agreed-upon core values being relentlessly reinforced through performance-based discussions, training, and reward.

For example, at Disney, any member of the cast can and will *stop the show* to ensure the safety of another cast member or guest. Disney places cast and guest safety above the mission of creating family fun. From our experiences in the energy sector, most progressive organizations are driving at a similar culture where frontline employees are empowered to *stop the show*. Yet many leaders still wonder if their people would actually do it when it mattered most.

Canrig Drilling Technology, Ltd., with global headquarters in Houston, understands this dynamic and has implemented a leadership awareness initiative which gives permission to the frontline employees to call out behaviors by peers or by company leaders that are not in the best interest of the organization. The consequences are both immediate and decisive. Any employee is also allowed, without fear of reprisals, to stop the show to check the safety ratings on a crane before lifting the next load. Even if the end results are that the job could have gone on without the delay, the employee is recognized for his or her proactive approach to safety. According to Bill Good, safety requires “looking at the business through new eyes each day.” One way Canrig makes this happen is by starting every meeting with a *Safety Moment*. This moment reinforces the serious nature of the business and crystallizes focus of activities on people.

Duke Energy, one of the largest electric power holding companies in the United States, is often cited as having best practices in the area of safety. At Duke Energy there is a team norm, *Tell me!* What this means at Duke Energy is that there is an atmosphere of transparency and trust. It is expected that behaviors or situations that are not in the best interest of the organization or their people will be immediately revealed. This atmosphere of trust has been fostered by top management and rigorously aligned through systems and processes throughout the organization.



Leadership Challenge

Is your current approach to strategically prioritizing the importance of people in your organization's mission, vision, and values driving optimal, measurable progress in the areas of safety and productivity? How do you specifically know?

The mistake most companies make is to set policies, procedures, vision, and values at the strategic level without providing a clear sense of how they expect leaders to operationalize it. The true power of any initiative is how leaders operationalize and bring things to life on a day-to-day level through the management of their people.

Is it clear to every leader in your organization how their behavior supports the strategic initiatives and can they clearly articulate this to their people? How will you remain sure? Furthermore, do both leaders and their people understand their roles in *stopping the show*?

Practical Application

Check alignment in leadership decision making at all levels. Given the same situation and same set of circumstances, would specific members of your leadership team reach the same conclusion and act in accordance? Would this same alignment remain intact if that same situation were provided to their direct reports to make the call?

Leadership Influences Culture—Each of Our Daily Personal Choices Changes Culture

Our choices are in no small way driven by our individual motives. Understanding that our values and unseen motivators drive choices is paramount to this discussion. Whether we are driven by money, knowledge, harmony, helpfulness, or power, order matters in how we make decisions. Which motivation is most important in driving a safe work environment is not the first question at hand. What matters first is that each of us has clarity on what is driving our individual choices and behaviors. From that understanding, each of us can then harness our strongest personal motivations to make better choices. We also can illuminate and eliminate motivations that are not in the best interest of our company, our peers, and ourselves. This is the beginning of leveraging what we do best and ditching the rest.

According to Rachel Moore, VP of Human Resources for Savanna Energy in Alberta, Canada, "Safety cultures vary locally across rigs within markets. At the wellhead, the leadership approach of drillers and rig managers sets the tone." Each driller or rig manager not only makes countless decisions, but just as importantly influences many more each day. Personal motivations and our previous experiences shape our leadership approaches for better or for worse.

Leadership Challenge

Have you assessed the motivation of your leaders in systematic and measurable ways in an effort to understand how you can better leverage these motivations to impact critical business outcomes such as safety and productivity?

Practical Application

If you are a leader driven by money, you can choose to embrace that as a motivation. Quantify the financial benefit of a safe work environment in real terms for your organization. If you are driven by knowledge, use your thirst for knowledge to ferret out the best safety practices in the industry and leverage across your organization. If you are driven by order, impact the policy and procedure of your organization to enhance safety in the work environment.

Systematic Processes Link Our Choices. Proven Processes Produce Proven Results. Flawed Processes Produce Flawed Results.

Significant time, energy, and money are invested to refine systems and processes in an effort to produce more energy more efficiently and more safely. This is a wise investment as order and clarity in processes is proven to create an optimal environment for both safety and productivity. Interestingly enough, the one process where the rubber meets the road—the daily informal performance-focused dialogue between employee and supervisor—remains loose. Without a systematic and disciplined approach to having these daily “on the fly” discussions, slippage takes place throughout the organization. When it comes to safety, this is where we begin to put lives and property in jeopardy. Utilizing a systematic and proven process leaves little to chance.

Blanchard® believes a key element to this refinement is the connection between supervisor and direct report at each level of the organization. This connection is best accomplished through more effective informal and formal performance-related discussions. Research by Marcus Buckingham confirms Blanchard’s experience that effective informal daily performance discussions delivered in a consistent and timely manner have the greatest impact on shaping behavior.

While API (American Petroleum Institute) and most organizations have long required a prework communication meeting, which is both vital and necessary before starting a new project or task, what is not made clear are the measurable competencies the leader conducting the meeting must possess. What is also not clear is how the manager and others will reinforce the message in a systematic process where each person’s commitment and competency will be understood and developed to create a safer and more productive work environment.

There is one connection that considers and impacts all the connections described above. It is the connection drawn between supervisor and direct report in each conversation, each day, at each level of the organization and the industry. It is the choice to be crystal clear in the messaging we send through our own personal words and actions. This is where improvements need to be made and it requires discipline—discipline in adapting a common language and approach to situations that each member of our organization can understand and agree on. Perhaps Jim Collins said it best when he taught us in his landmark research that to sustainably and measurably go from “Good to Great” requires Disciplined People, with Disciplined Thought, acting in Disciplined Processes.

Situational Leadership® II: A Tool for Tightening and Improving the Connection between Leader, Direct Report, and Communication

Blanchard has worked with many oil and gas organizations to improve the quality of decisions that people make in the workplace each day and their resulting actions in any given situation. Leaders and organizations need a systematic approach to communication that allows them to leverage the competence and commitment of their people. Blanchard’s approach ultimately holds both supervisor and direct report accountable as partners in creating measurable bottomline results. Just as important, is the element of trust that is built between supervisor and direct report.

Each individual is at a specific development level for the job they are being asked to do. More particularly, they are at a specific development level for each of the primary tasks they are being asked to do in their job. It is at this level of task-specific performance that the most effective leaders focus and impact performance.

Each person’s development level can be broken down into two basic components: competence and commitment. Both components work together to create the observable performance we are trying to influence as leaders.

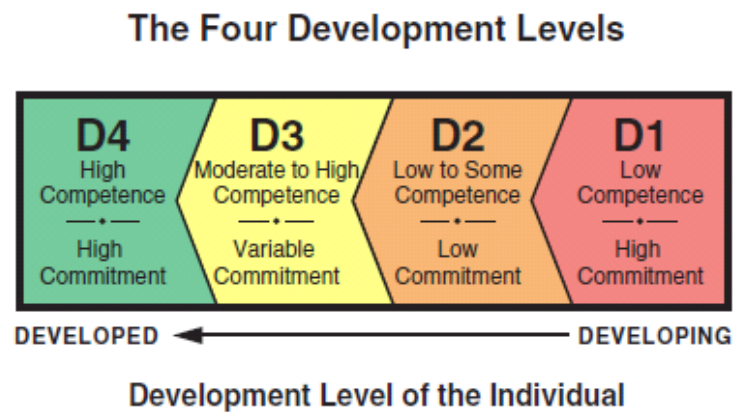
Competence is the knowledge and skills an individual brings to a goal or task. Competence is best determined by demonstrated performance. It can, however, be developed over time with appropriate direction and support. Competence is gained through formal education, on-the-job training, coaching, and experience. Experience includes certain skills that are transferable from a previous job, for example, the ability to plan, organize, problem solve, and communicate well. These skills are generic by nature and are transferable from one goal or task to another.



Commitment is a combination of an individual's motivation and confidence on a goal or task. Motivation is the level of interest and enthusiasm a person has for doing a particular job. Interest and enthusiasm are exhibited behaviorally through animation, energy levels, and verbal cues. Confidence is characterized by a person's self-assuredness. It is the extent to which a person trusts his or her own ability to do the goal or task. If either motivation or confidence is low or lacking, commitment as a whole is considered low.

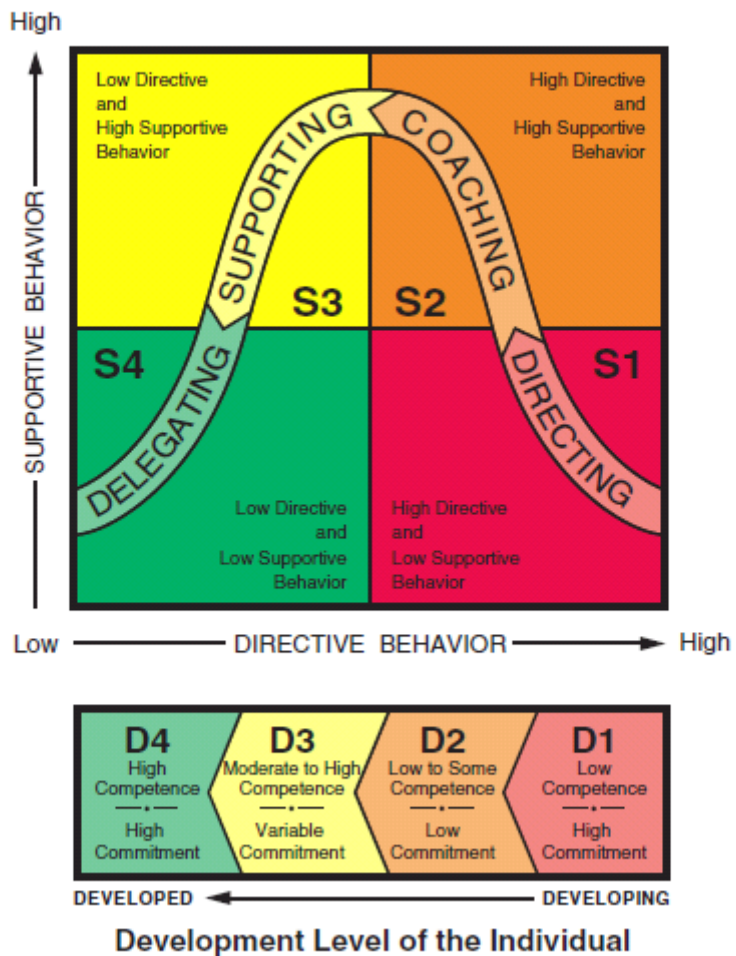
The four development levels of the SLII® Model are characterized by combinations of varying amounts of competence and commitment. The development of an individual to his or her highest level of performance can be seen as a journey. Although the goal is self-reliance (being able to perform independently), the individual at each level of development has distinctive needs along the way. As the development level of an individual increases, his or her competence and commitment fluctuates. See Figure 1.

Figure 1: The Four Development Levels



The goal of SLII® is to match the leadership style that is appropriate to an individual's development level at each stage of development on a specific goal or task. The leader provides the direction and support that an individual needs in order to move along the development continuum—through the development cycle—from Development Level 1 (developing) to Development Level 4 (developed). As development level changes, the leader's style should change. See Figure 2.

Figure 2: The SLII® Model



A final component in the SLII® Model is Partnering for Performance. Partnering for Performance is gaining the individual's permission to use the leadership style that is a match for the individual's development level. In partnering, the leader and the individual agree on goals, development level, leadership style, future leadership behaviors, how to stay in touch, and how often to stay in touch. Teaching SLII® to individuals helps them understand their role in the partnership. Once goals have been agreed to and both the leader and the individual know SLII®, they can mutually diagnose the individual's development level and agree on an appropriate leadership style. It is in this ongoing agreement that the direct report's personal connection with the leader is established and solidified. Through applying SLII®, the leader is empowered with an effective method to provide their direct reports with what is needed at each stage of development which establishes an atmosphere of fairness and caring.

At its essence, safety is first and foremost a very personal matter. As such, it has great meaning to us naturally. We understand that we need to collaborate or work as a team to create a safer work environment for all. We expect that the hard and fast rules of safety will apply to all people regardless of position or tenure. We respond to recognition when we do a good job and want to continue that same behavior for both selfless and self-serving reasons. Our individual growth and development demands that we be safe as a prerequisite. Perhaps no other topic discussed and worked on together in practical ways connects us more closely to our supervisor and our peers than safety. As a leader, it's not enough to simply have a discussion about safety. Leaders must diagnose the competence and commitment of their people, determine the corresponding development level, and then tailor the message and conversation to the development level and come to an agreement on the best way to proceed.

Leadership Challenge

Do you understand what engages your people to give their personal best?

How effective is the systematic, replicable model that your managers currently employ to affect the engagement and quality of decisions in your organization?

Practical Application

Identify those managers who are consistently rated as most effective by their peers and direct reports and historically achieve the critical business outcomes assigned to them. What do they do on a daily basis to achieve these results?

Assess practical workplace factors that are proven to create work passion such as connectedness to leader, connectedness to peers, meaningful work, fairness, autonomy, growth, and collaboration.

Confidence

Confidence can also be influenced by our own self-assessment of our ability to do a certain job, which affects how we do it and, in some cases, if we even attempt to do it. What is interesting is that our self-confidence, if not tempered by another person's objective input, is often flawed. In other words, we have blind spots in our abilities just as we have blind spots while driving down the road without the help of a rear-view and side-view mirror. It would be useful in every given situation to be clear whether confidence in our ability is based on fact or conjecture.

Leadership Challenge

Is self-confidence of your people based on conjecture or observable performance?

How can you be more certain?

Practical Application

Assess the level of confidence that your people have in specific tasks that are high risk.

Assess the level of confidence that their supervisors have in their people for the same jobs. Is there alignment between the two?

Competency

Competence can be understood by examining transferable knowledge and observing task-specific knowledge. As the energy industry becomes increasingly focused on competency-based training and accountability at the wellhead, it is vitally important that we understand how this building block in a person's development level is affected by and affects the individual's commitment to the task at hand.

What we have learned in previous experiences contributes to our competency and affects our choices today. If we surfaced ideas to make the workplace safer in our previous job and this was not openly received, or worse yet, it was squelched, we will hesitate to do so again without proactive leadership that draws this out.

Leadership Challenge

Do you understand what experiences and knowledge your people bring into the workplace, both to the detriment and benefit of the organization?

Practical Application

Understand what previous experiences affect your employees' current behavior today by opening up dialogue in this area. Ask specifically what their experience and knowledge has been for the task at hand as well as other related tasks.

Observable Performance Demonstrates Competency

This is where the rubber meets the road. It is from our observable behavior that results are immediately created. This is truly the only sure sign of mastering any given task. Our proven ability to do a certain task, and the consequences and rewards we have experienced as a result, affect our future choices.

Leadership Challenge

Do you determine ability ultimately on observed behavior as opposed to perceived potential? Do you view development level by first identifying each role's specific tasks or take a more general approach?

Practical Application

Break down each role into specific tasks. Determine development level based on whether you have observed mastery of the task or if the person is still developing mastery from your observations.

SLII® in Action

To illustrate how the SLII® Model works, we'll use an example of an offshore production platform. Let's suppose a new worker is performing routine maintenance of the pipeline to the shore by launching a pig. This tool will do the dirty work of clearing out any paraffin build up in the pipe between the platform and the onshore refinery. The supervisor will employ the SLII® Model to engage the direct report fully in the job.

Assuming that the worker is new to the job, he or she would most likely be a D1, or what we call an *Enthusiastic Beginner*. Armed with the necessary transferable knowledge of Hazardous Materials, OSHA, and API training, the worker would start out incredibly alert and enthusiastic. This excitement, if unchecked by close, expert supervision, could lead to disastrous results. The worker needs clear direction. The supervisor should show and tell the worker specifically, step-by-step, what needs to be done. The supervisor would ask the worker to study the company's procedure, set a goal for the worker to learn how to do this task independently over time, and want the worker to succeed. The supervisor would demonstrate what a good job looked like by evacuating the chute of pressure. The supervisor would be meticulous about ensuring all the pressure is released before opening the hatch and would remind the worker once again of the reasons to wear personal protective equipment at all times. The supervisor would also tell the worker never to stand in front of the hatch when it's opened, even when the pressure has been evacuated because the supervisor truly cares about the worker's well-being. The worker would feel growth and confidence in the new knowledge, and can't wait to get his or her hands dirty and try for himself or herself.

After observing the supervisor a number of times, the worker is now allowed to handle this task under the supervisor's watchful eye. However, the supervisor has made the task seem simple when in reality it is not as easy as it looks. There is a lot to remember. Is all the pressure off the chute? What is the proper sequence of opening and closing the valves? This can feel overwhelming and it is in this moment when the worker can turn from an *Enthusiastic Beginner* to what we call a *Disillusioned Learner*. The supervisor then tells the worker what is going to happen when the pig enters the pipe, clearing paraffin build up and ensuring a full flow of products to our refinery on shore. This information gives the worker a sense of meaning in his or her work. The supervisor then quickly and clearly redirects the worker to place the pig in the chute backward. In this moment, the worker needs high levels of both support and direction. Making mistakes is part of the learning process but can only be tolerated at this stage while people are under close supervision. The consequences of making a mistake provides even greater meaning to doing the job correctly. The supervisor patiently watches the worker try again until he or she can reliably demonstrate competence.

After having done the task a number of times with the supervisor in various situations, the worker is then asked to complete the job without the supervisor. The supervisor will be close by if needed for reassurance. With a greater sense of autonomy, the worker will become a *Cautious Performer* since he or she will have done this before many times under the supervisor's watchful eye, yet will still need some support and may ask the supervisor to check his or her work. At this point the supervisor should simply remind the worker that he or she has done this successfully before. The supervisor could ask, "How will you know if you have done it right or wrong?" At this stage of development, if the supervisor had simply told the worker, "Yes, you are right," or fixed it, the supervisor would be feeding the worker's lack of self-confidence, undermining the progress that had been made in developing competence and commitment. When the worker is notified that the pig arrived safely at its destination on schedule, the only recognition needed from the supervisor would be to shrug and say, "Nice job! You had it all along!"

After performing this particular task safely and efficiently in a variety of situations, the worker will become highly committed and competent, or a *Self-Reliant Achiever* who has mastered the task. At this point, the worker needs a low level of support in the form of opportunities to share his or her knowledge and inspire others to do the same.

At each development level, in each situation, people need a supervisor and leader they trust and who understands what is needed at that particular stage for the specific task at hand—a supervisor who can diagnose what their people need and is both willing and able to flex their leadership style through appropriate combinations of support and direction. When people experience this type of leadership, they build a close connection with both the leader and their colleagues. They perceive that they are being treated fairly and are growing in their responsibilities. The measurable result is that people move from learning their jobs to doing them more safely and productively.

The Business Case for Safer and More Productive People

The math is simple. Organizations cannot afford for people to get hurt on the job. They also cannot afford to accept anything less than optimal productivity. The math gets exponentially more interesting when we consider that virtually every effort we make to be safer simultaneously creates a situation where we can then become more productive.

Safe Choices + Productive Actions = Safe, Productive Situations

Safe, Productive Situations = Safer, More Productive People over Time

Safer, More Productive People = Results over Time

Let's take a practical example from a real work situation. Oil and gas companies have rigorous preventive maintenance schedules in place for all equipment. Each time we perform preventive maintenance we accomplish two primary objectives: make the workplace safer and make the workplace more productive. It is the same with our day-to-day performance-based discussions. Each time our people become more engaged in their work by becoming more connected to their supervisor or their peers or understanding the meaning of the work, they become both safer and more productive. We see this time and time again in our work. Many critical business outcomes are directly improved as a result of focusing on one key connection—how leaders systematically influence their direct reports' performance.



About The Ken Blanchard Companies*

With more than three decades of helping leaders and organizations, more than 18 million books in print, programs offered in more than 12 languages, and clients across six continents, The Ken Blanchard Companies is recognized as one of the world's leading training and development experts. Our groundbreaking thinking and memorable learner experiences create lasting behavioral change that has measurable impact on the organizations with which we work—companies that wish to develop leadership capacity, improve workplace cultures, drive organizational change and strategic alignment, and become high-performing organizations. Using a collaborative diagnostic process, we help identify each organization's unique needs and business issues, and then help to develop an appropriate leadership strategy to drive results and profits.

As the innovator of SLII® —the most widely used leadership development system in the world—our behavioral models add a situational context to the training experience so individuals learn to be more productive in real-world scenarios and make the shift from learning to doing more quickly and effectively. Learning takes place through both instructor-led and virtual experiences offered by our worldwide network of consulting partners, trainers, and coaches.

To learn more, visit www.kenblanchard.com.

In summary, the most effective leaders focus on alignment. They rigorously link strategic vision to operational practices. They build trust in their organizations through honest and skillful communication deeply secured in a culture that truly cares. The most effective leaders consciously diagnose the needs of their people and match their leadership style to those needs. Finally, they model the behavior they expect from their people. True alignment exists between the hearts, the heads, and the hands of today's most effective leaders.

Perhaps Rachel Moore, VP of Human Resources at Savanna Energy says it best: "It seems it is not enough to simply be skillful in diagnosing development levels of workers and flexible in adjusting leadership styles. Leaders must also make close personal connections with their workers and show they authentically care."

About the Author

Dean Brainard, Consulting Associate with The Ken Blanchard Companies®, brings a wide range of experience working as a consultant, trainer, and manager. As a third-generation Oil and Gas industry employee, he draws from more than 25 years of experience working with premier energy companies upstream at the wellhead in the Gulf of Mexico and Permian Basin and downstream with progressive distribution companies throughout the northeastern United States and Canada.



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