

CRM IMPLEMENTATION CHECKLIST

1. Identify the Need - If it ain't broke then don't fix it.

Do some research in your own organisation to find out whether there is any need to carry out any CRM training. However, be self critical and avoid complacency or overconfidence – it is extremely unlikely that all your crews perform to the highest standards of CRM all the time, especially when faced with difficult situations or severe commercial pressures.

Also your financial director will not give you a bean and your flights ops director will not approve of releasing crews unless you can *demonstrate* a pay back.

Where do you identify the need?

There are three areas where you need to look.

1. Incidents that cause direct financial loss to your company where a failure of CRM may be a contributory factor, such as:-

- Damage (Heavy landings, overruns, collisions, breakages, overstresses)
- Loss (Overshoots, navigation or flight planning, fuel usage, missed slots)
- Fines (Regulatory deviations, compensation, passenger or crew injury)

2. Incidents that cause a reduction in revenue to your company where a CRM failure may be a contributory cause, such as:-

- Customer dissatisfaction (Delays, discomfort, poor information, mistreatment)
- Reputation (Bad press, poor service, unreliability, CAA audits)

3. Current CRM performance that has the potential to cause any of the 2 above in the future or worse an accident.

- Incidents that were avoided through good luck.
- Situations that would have become very serious with the addition of a technical failure or bad weather.

How do you identify the need?

Follow these guidelines:-

- Do something – don't just think it is all too difficult.
- Be conservative – your credibility will be blown if you exaggerate.
- Accept subjectivity but try and be as factual as possible.
- Monitor trends.
- Record as much as you can and design a system that is easy to use.
- Encourage everyone to contribute.
- Use others in the organisation (accounts, engineers) to help you estimate costs.
- Present the your findings simply and clearly.

2. Determine your CRM standards.

You need to be absolutely clear what it is that you are trying to achieve. Don't throw the whole CRM subject at people, because they don't like it, they aren't sure what it is and they don't often know what you want. Focus on some key areas only and be unambiguous on the standards required.

What are CRM standards?

CRM standards are what any experienced crew will tell you represent best practice in operating aircraft, but over the years have been proposed by several organisations eg:-

- Establishes atmosphere for open communication.
- Takes condition of other CM into account.
- Takes initiative to ensure crew involvement and task completion.
- Encourages crew participation in planning and task completion.
- Monitors and reports changes in systems' states.
- Identifies possible future problems.
- Reviews causal factors with other crew members.
- Considers and shares estimated risk of alternative options.

(A selection taken from NOTECHS but you can use any of the current ideas available)

Which ones do we choose?

Select the areas that are linked to the problems that you have identified in your research and use only a handful to start with. Check these out with line crews and get broad agreement on the need to improve.

Then what?

State clearly your training objectives for the year ie.

From April 2001 until March 2002 we will be concentrating on ensuring that all commanders and crews achieve the following standards:-

- A. They establish and maintain an atmosphere that encourages open communication.
- B. They encourage crew participation in planning and task completion.
- C. They identify possible future problems and consider contingency actions.

If necessary you can highlight the incidents and losses caused to your organisation by a failure of these standards and you can add explanatory notes of what they mean in practice.

3. Develop your training strategy.

You have to decide what is the most efficient and effective way of ensuring that your crews achieve these standards.

What are the options?

1. Send out a memo explaining what is required & asking that they abide by the standards.
2. Explain the standards and threaten with dismissal if they don't abide.
3. Send everyone on a 1/2 day training course to learn the standards and how to apply them.
4. Send everyone on a 1 day training course to learn the standards and how to apply them.
5. Send everyone on a 2 day training course to learn the standards etc.
6. Send everyone on a 3 or more day training course to learn the standards etc.
7. Train only key people who have peer influence over others and let them role model.
8. Train just commanders and let others learn by example.
8. Train your instructors to develop these skills on check rides or simulator sessions.
9. Make a video and ensure everyone watches it.
10. Subject everyone to psychometric testing and then let them work it out for themselves.
11. Do nothing at all and hope things will improve.

If we decide on a training course what do we do?

You need to make sure that the training is directly related to the standards you are trying to achieve – so don't accept packaged CRM solutions that have minimal value. Either design something yourself or seek advice from training specialists, but you need to be imaginative and practical, and allocate an appropriate amount of time.

Tell me more !

OK - lets assume you have had a problem with crew input and you are going to focus on Objective B above which is encouraging crew participation in planning and task completion.

Step One: Think about the process that you will use to achieve this.

Here it is to get people to recognise why they don't encourage crew participation, to understand the benefits of doing so and to motivate them to change.

Step Two: Carrying out the process:-

1. Set the atmosphere so that people are comfortable and can be honest.
2. Have a discussion that identifies why people don't use others and the reasons why.
3. Consider the validity of these reasons.
4. Carry out an exercise that demonstrates 2 or 3 brains can be better than one. *
5. Debrief the exercise fully.
6. Agree what they will do in future, agree any support needed and set follow up actions.

Estimate time: 2 hours.

* (Lost in Space or Arctic Survival are pretty good)

Step Three: Provide support and follow up.

4. Measure and track developments.

You need to be able to evaluate the benefits of the training to your organisation. So make sure that you repeat the research process and identify improvements in performance.

Your Board will want to see reductions in costs and improvements in revenue, including reductions in risk to the organisation.

If you cannot demonstrate this then you are not going to get any more support in future.

5. Continuous improvement.

Having achieved this years objectives then identify either other CRM standards that you would like to achieve or concentrate on getting even better at those you have.