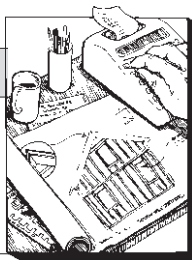


Get It Straight Before You Start

by Tom Swartz



After too many bad experiences, we've learned that the best way to get a project straight is to hold a meeting with clients before work begins. Pre-construction conferences have saved us an incredible amount of work and confusion. They've also saved us plenty of money.

At our company, a typical job passes through two different people before work begins. The salesman works with clients to understand what they expect from a project, what it will look like, and how it will function. But once the bid's accepted, the production manager and the lead carpenter take over. Without good communication between these two and the sales rep, clients will find themselves explaining their ideas again to the production crew.

As the job progresses from an idea to working drawings and specifications, the various people involved form different perceptions. Clients may wonder how much of the information they discussed with the salesman was filtered through to production. In turn, the production manager might wonder exactly what the salesman promised.

Unless a remodeling job is small enough for our Handyman Service, where the actual craftsman is also the salesman, we hold a pre-construction conference seven to ten days after the contract is signed. Timing it this way works well for two reasons: it's a good follow up to the sale, and it gives us a chance to measure for and order any special materials that may take several weeks for delivery.

Usually held at the job site (typically the client's home), the conference includes our sales representative, production manager, and lead craftsman, and, in case of an insurance loss, the adjuster. If the customer is a couple, we encourage both of them to attend since this is also a good time to make sure they are in agreement about the job.

The conferences last anywhere from 45 minutes to one-and-a-half hours. This may seem like a lot of expensive time, but redoing work and, worse yet, leaving customers dissatisfied, costs much more.

Passing the Baton

The pre-construction conference provides a good opportunity for us to transfer control from the salesman to the production people. Early in the relationship, the sales-

man explains our company policies, and tells the client that the production manager and lead craftsman will assume control of the project once the contract has been signed. Then, at the start of the pre-construction conference, the sales rep introduces these people and lets them take over.

Because the customer expects this transition, there's no breach of confidence. At the same time, the production team can ask informed questions because they've reviewed the plans with the salesman before the meeting and have a good, basic knowledge of the project.

The conference is also a good time to review the contract, specifications, and plans. It's amazing how many misconceptions can surface during this part of the meeting. For instance, the sales rep may have specified a 5-foot window on one wall, but the clients had visualized a floor-to-ceiling window. At this point, it's still easy to make this kind of change since materials have not been ordered and work has not yet begun.

Laying the Ground Rules

To make a project run smoothly, we've developed a list of particulars that we discuss during the pre-construction conference. These are the kinds of details that can make the job pleasant for our crew and our clients. We include the following:

- What time the work is to start and end each day. Our normal hours are 7:30 a.m. to 4:30 p.m. This is okay for the majority of our clients, but some ask that we arrive an hour later.
- How change orders are handled. We make it clear that change orders are costly and will delay the project.
- Any particulars about pets. For instance, if the cat is de-clawed and should not get out of the house, we need to know it.
- The dangers involved in the project. These should be explained to children who are home when their parents are not. We also ask parents to discourage their youngsters from "helping" the painter paint or the carpenter cut plywood.
- Which toilet facilities, if any, may be used by our employees and subs.
- Which telephones can be used.
- Whether smoking is permitted in the house or yard.

- The reason for lien waivers, which we supply after each progress payment and at the final payment.
- Payment schedules and procedures. We've found that customers will often send the check before we ever invoice them because we went over the payment schedule at the conference.

In addition to all of this, we make it a point to review our employee policies. For example, our employees and subs should not accept food or even coffee from our customers, and we let everybody know it. We also have a strict policy against drinking on the job, even the occasional beer offered by the client.

We also discuss our effect on the neighborhood. We explain that lawn signs are important because they help suppliers and subcontractors find the job site. Of course, this is also good advertising for us. Some clients prefer that we don't post any signs, and in some neighborhoods they may be forbidden.

We make sure to ask our clients for their permission to send a letter to their neighbors informing them of our presence in the area. In the letter, we warn the neighbors that there will be strange trucks on the street. We also ask that they report any problems, like debris flying into their prize rose gardens, to us and not to their neighbor. Once again, this is good advertising for us.

Since many of our customers are away during the day, we always designate a communication box. It's a place where notes, partial invoices, and payments can be left. This saves a lot of trouble if you need to let the customer know you won't be on the job because you're waiting on an inspection or a sub.

Finally, we discuss the phenomenon we call "remodeling fever." This is the sudden realization by the clients, which can strike at any time, that they are tired of all the inconveniences that come with a remodeling project. During the conference, we try to prepare them for what's to come, and encourage them to look beyond the disruptions to the finished product. This is especially important for those who've suffered a fire loss. They didn't ask for the remodeling to happen and they are traumatized before the project begins.

All of this information is also included in the presentation book we give to potential clients. That way they can see the kind of attention to detail we provide. In this sense, our pre-construction conferences not only help us once we've got the job, they also serve as a sales tool. ■

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