



Using Flow Charts for Management and Sales

by Paul Eldrenkamp

A little over a year ago, I started using my computer to generate flow charts. The original plan was to provide myself and my crew with something that showed the course of a project more clearly than a bunch of detailed notes. With the chart, we can see, at a glance, when the cabinets will be installed or which subs will be working together at a given time. When someone has a question about a date or the sequence of events, I can answer them without rummaging through folders and piles of notes.

Generating the chart is also a good way to get organized. It forces me to take time to think a project through. When it's finished, the chart provides us with clear goals and deadlines.

On a recent addition, for example, I allotted 20 weeks from beginning to end. Midway through, we found ourselves running about a week behind. Looking at the chart, I realized the plasterers had the place to themselves for seven days. I was able to save that lost week by having the plasterers complete a few rooms at a time so that other subs, the trim carpenters in particular, could do their work concurrently.

lot of time and some artistic skill. So instead, I use *MacProject* (Clariscorp., 5201 Patrick Henry Drive, Santa Clara, CA 95052; 408/727-8227), project management software for the Macintosh personal computer. Once I've input the necessary information, the program not only defines a critical path, it also defines the relationships among the various tasks. With *MacProject*, I can organize my charts by personnel, subs, and even cash flow. I can also provide bar charts, which are more readable for some people.

Users of IBM-compatible systems have a range of project management software to choose from. One of the best is *Microsoft Project* (Microsoft Corp., One Microsoft Way, Redmond, WA 98052; 206/882-8080) which prints out a linear chart that defines your critical path. Another well known program is *Harvard Project Manager* (Software Publishing Corp., P.O. Box 7210, 1901 Landings Drive, Mountain View, CA 94039; 415/962-8910), which can generate charts based on a variety of tasks.

The chart that *MacProject* produces looks good enough to give to customers, although you could add

them on their refrigerators for referral. We also keep a spare copy posted on the site. I don't usually give copies to subs, although this might be helpful to some.

I don't do charts for all our jobs. There just isn't much to illustrate on a small job. Generally, anything from a bathroom and up gets one.

Working with Customers

Aside from their value as a sales tool, charts are a good way to show clients the importance of making timely decisions on details like lighting fixtures and flooring. It helps them to understand that their milestones will be delayed unless they act within the schedule.

On the McIntosh job, a 200-square-foot kitchen remodel in Newton, Mass., the client worked with an interior designer to select a high-quality vinyl flooring. Because it had to be special-ordered, the flooring arrived late. The chart came in handy here. The homeowners could see the ramifications of special-ordering the vinyl flooring. We had estimated that the job would be completed within four weeks, but the extra two weeks it took for the flooring to arrive changed that plan.

It was important to the McIntosh to have the appliances installed before the painting and flooring was complete. While we usually don't work in that order, it wasn't a problem. Thanks to the chart, everyone associated with the project, from our crew to our subs, knew that the sequence of events was a little different.

Flow charts are not for all customers. Some clients are good at using them to visualize the process. Others prefer it if you explain each step in detail or give them lots of written information. As far as I'm concerned, however, any tool that helps me do a better job communicating with both my clients and my employees is worth using. ■

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I've found another significant benefit of flow charts: They are an excellent sales tool. I include one with proposals to many prospective clients. It helps them to better understand our proposal by showing an uncomplicated breakdown of the costs and the steps involved in their project.

I've found most clients worry a lot about timing. You can give them a verbal or written estimate, but that is not reassuring to many. The chart, however, sends a strong message that we are committed to following a schedule and providing accurate time estimates. It also shows that we have thought the project through. And, perhaps most important, it distinguishes us from other remodelers bidding on the job.

Generating a Flow Chart

You could probably draw a flow chart by hand using a template and a ruler. But making it attractive and keeping it current would require a

some color to highlight the more important events. I illustrate the project "milestones" with larger boxes that have rounded corners. These might include the date the tub will be usable on a bathroom remodel, or when the stove will be accessible on a kitchen remodel.

It takes me roughly 45 minutes to complete a chart, including about 20 minutes to draw it and another 25 minutes to plug in the information off the bid sheet. On large jobs, like major additions, it might take longer. I usually spend about 15 minutes each week updating the charts.

I surround each box with four dates. The top two are the earliest start and finish. The bottom two are the actual start and finish. By watching these dates, our production manager can keep close tabs on scheduling.

Copies of the charts generally go to everyone in our company involved with the project, as well as to our clients, some of whom post