



The Fine Art of Note Taking

by Jim Tolpin

I'll never forget my introduction to a contractor's world of paperwork. My boss asked me to join him in the cab of his truck to "get some paperwork out of the way." As I slipped into the cab, I realized he was speaking literally. Towering sheaves of pink and yellow paper completely smothered the dash board from one side of the truck to the other. My boss mumbled something about feds, forms, and fornication as he searched haphazardly through the piles.

Wintry air began to fill the truck, and I asked if he minded if I turned up the heat. "Go for it," he said, and I flicked the fan to high. Unfortunately, the heater was set to defrost. Within seconds, the cab was filled with a blizzard of yellow and pink paper snowflakes. My boss never did find the form he was looking for.

Job Board Office

In the years since that portentous experience, I have climbed into the driver's seat, so to speak. Unlike my first boss, however, I don't keep my office on my dashboard. Instead, I keep it on a clipboard.

For every job in progress in my cabinetmaking business, I keep a separate clipboard — which I call a "job board" — prominently labeled with the job name. I use a letter embosser to make legible stick-on labels that can be replaced easily when the time comes to set up the board for a new job.

I take the appropriate job board with me whenever I leave my shop to visit the site, the client, or any suppliers or subcontractors. All receipts, change orders, sketches, specifications changes, and invoices I collect

on my travels are clipped to the board. When I get back to the office in my shop, I transfer the paperwork to the appropriate files. Into the "Live" file go the change orders, new specs, and sketches. Into the "Standing" file go the receipts and invoices, and any specs or drawings that have been superseded by new information.

Every day, I stock the clipboard with a new job sheet, dated for the current day. On this sheet I record my hours and any materials purchased for this particular job. If I don't have my travel log or phone log handy, I also use the job sheet to record travel time, mileage, and phone calls. To make life easier for the bookkeeper (and for me and the IRS), I later transfer this information to the proper logs.

The Question Log

The most crucial function of the job board, however, is to hold a ruled legal pad on which I record all of the conversations — my own or my employees' — that result in a question or some action pertaining to a job. This "question log" method of note taking provides me with a fail-safe way to create a paper trail from the initiation of an action through to the completed transaction.

Because this log could save my neck someday in the event of a lawsuit, I follow several rules to protect its value as a piece of evidence:

- use a new, full pad for each job;
- number all of the pages;
- never tear a sheet out;
- date every entry.

Keeping such a careful record of questions and conversations helps me to ensure that all questions are ultimately answered, and it indicates how and when they are answered.

I follow a specific procedure for recording questions in the log (see Figure 1, next page). First, I put the date in the left hand margin, and give the question a number. Then I record who originated the question, their phone number, and what the question was. I also cross reference to the numbers of previous conversations, if any, that dealt with this question. Finally, I state the action to be taken. I always leave a couple of spaces between numbered questions for additional comments.

How It Works

The sample log in Figure 1 shows how effective a question log

can be in tracking an action from its initial appearance as a question to its outcome as a change in the construction process (and often in the billing for the job). In question number 31, the client asked us to add a drawer to one of the lower kitchen cabinets depicted on sheet A-10 of the architectural drawings for the job. Since I did not design this particular set of cabinets, I made a note to call the designer for approval. I also circled the number 31 to show that some action — in this case, a call to the designer — needed to be taken on this question. After making this call, I checked off numbers 31 and 32 to show that action was taken.

Number 32, also now checked off, is the record of my conversation with the designer, who approved the drawer change. The next conversation, number 33, records my quote to the client of the cost for the additional work. Number 34 is the client's return call giving me the go ahead. For future reference, I cross-referenced numbers 31 and 34 to help me find my way back to the question that initiated this action. This is especially important for a large job where there can be a dozen or more unrelated questions between the original inquiry and its resolution.

Number 34 is also circled, indicating that action must be taken on this question: I have to write a change order. The "CO" written next to the number in big print tells me that a change order was, in fact, generated by this conversation. When I make up the change order form to send to the client, I mark it with the "Q-number" to reference the question log — in this case, "Q34" (see Figure 2). The "Q34" notation also shows up on the invoice if this change is billed separately.

The presence of the Q-number on the change order and invoice is invaluable if a question about this new drawer comes up somewhere down the road. Not only will I have a signed change order in hand, but I will be able to go to my question log and quickly trace the conversation that generated the change in the first place. ■

Jim Tolpin, a kitchen subcontractor, was introduced to the question log by Terri Mielke, a designer, draftsman, and note taker extraordinaire. Both are from Port Townsend, Wash.

10/7/92 ✓(31) HASKINS (385-2427)
Can another drawer be installed in A10?
Call designer (385-1634)

10/8/92 ✓32. Randolph (designer): OK on
design change to A10.

10/8/92 33. I tell Haskins Randolph OK's
change. I quote ballpark of
\$33/drawer and \$48/door + rail.

10/10/92 (C.O.) (34) Haskins gives go ahead for
change — Q34.

Figure 1. In the author's "question log," he makes notes concerning every conversation about a particular job, and dates and numbers them. The "CO" notation on line number 34 indicates that a change order was generated.

CHANGE IN PLANS AND SPECIFICATIONS

Date 10/12/92

THE UNDERSIGNED HEREBY AUTHORIZE INTERWOOD CABINETS
to make the following change from the work as originally set forth in the
plans and specifications for the contract dated 9/8/92

ADD DRAWER TO UNIT ON A10. (Q-34)

for which an ADDITION of \$ 81.00 is made FROM the
contract price.

Signed A. Haskins

Figure 2. The author includes the "Q-number" on change order forms — in this case, "Q34" — to trace the notation in the question log that generated the change.