

REALISTIC SCHEDULING FOR Remodelers

While most contractors would prefer working to a predictable and accurate calendar, the

by John Sylvestre & Kate Post

reality is that many remodelers put little faith in scheduling. Instead, they believe that after the first day on the job, things will change so much that any fixed plan will become useless. On the other hand, those same remodelers are unlikely to look their customers in the eye and tell them it's impossible to deliver a project on time or on budget.

Detailed scheduling allows our company to effectively use *all* of our resources — not only our tools and equipment, but also our subcontractors and, of course, our own staff. We provide a complete schedule to each client, every sub, and all our staff for every project that we do. The schedule is put together by our production manager, Kate, who is ultimately responsible for producing the project by the schedule, on schedule. (If we allowed a salesperson to create the schedule, he or she might sell a fast and rosy future that the production team couldn't deliver.)

Fixed completion date. The schedule is our road map for the total project. It becomes a working tool for planning material deliveries, scheduling subcontractors, and notifying the clients of critical junctures, such as when to vacate their kitchen. It also includes



the staff's vacation dates, key meeting dates, and progress payment dates. Most important, the schedule fixes a specific date for project completion.

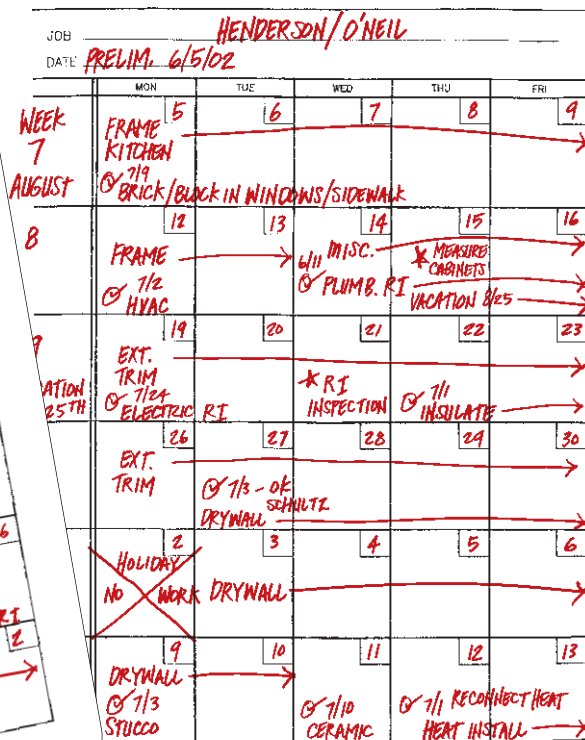
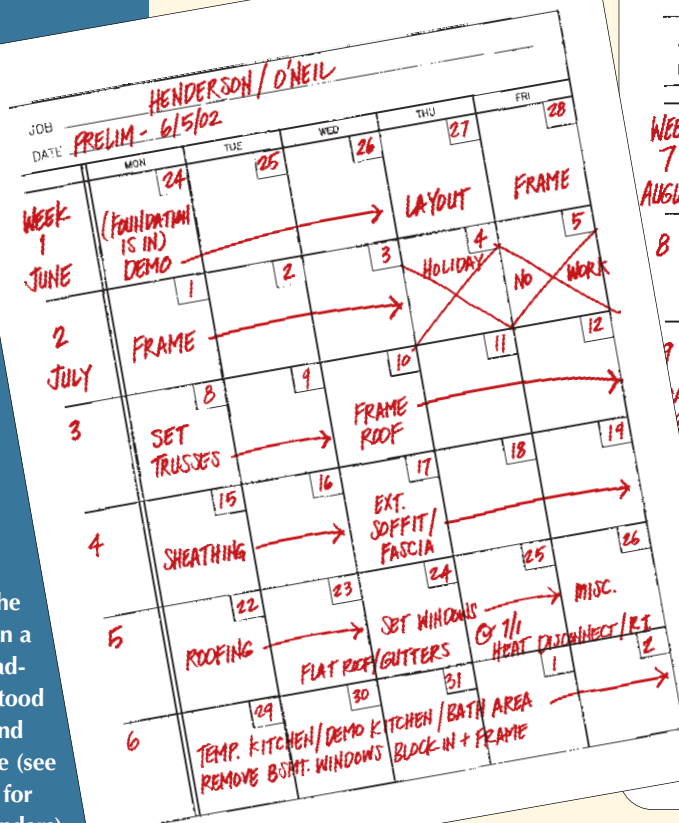
Visualization

Every builder schedules work, at least on a small scale. Before you pour concrete footings, you must first excavate. You have to complete the trim work before you start the painting. The overall, large job schedule is composed of these smaller sequences.

When you think through any project,

Thoughtful
planning means
overlapping
projects run
smoothly and
predictably
every time

A job calendar presents the schedule in a format readily understood by crew and client alike (see next page for more calendars)



the sequence is basically the same: excavation, concrete, framing, mechanical rough-ins, insulation, drywall, interior trim, mechanical finish, job finals, and punch list. Whether the job is a bathroom remodel or a whole-house renovation, the general process is the same. Only the time and complexity of each phase may vary. Framing for a bathroom remodel may take three days, while framing for a large remodel may take three months. But the following phase will always be mechanical rough-in. Visualize a line through your project, with each major phase a circle on that line. The distance between circles may change from one job to the next, but the direction and sequence of the circles will always remain the same.

One challenge to scheduling is the tendency to become bogged down in the details, to "micro schedule." The trick is to capture the big picture — the project's milestones, or "macro

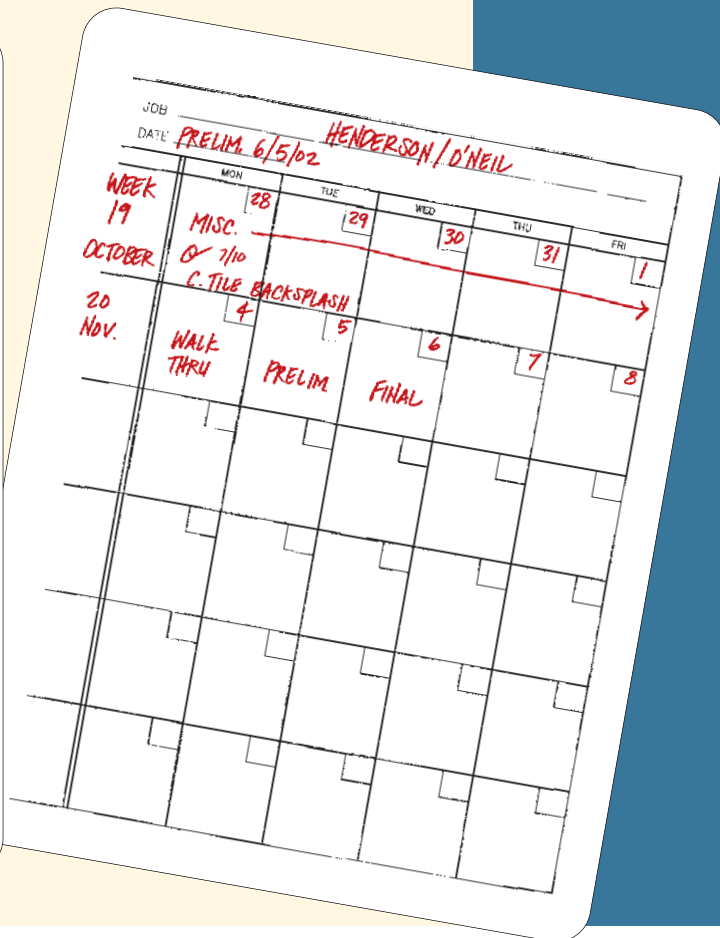
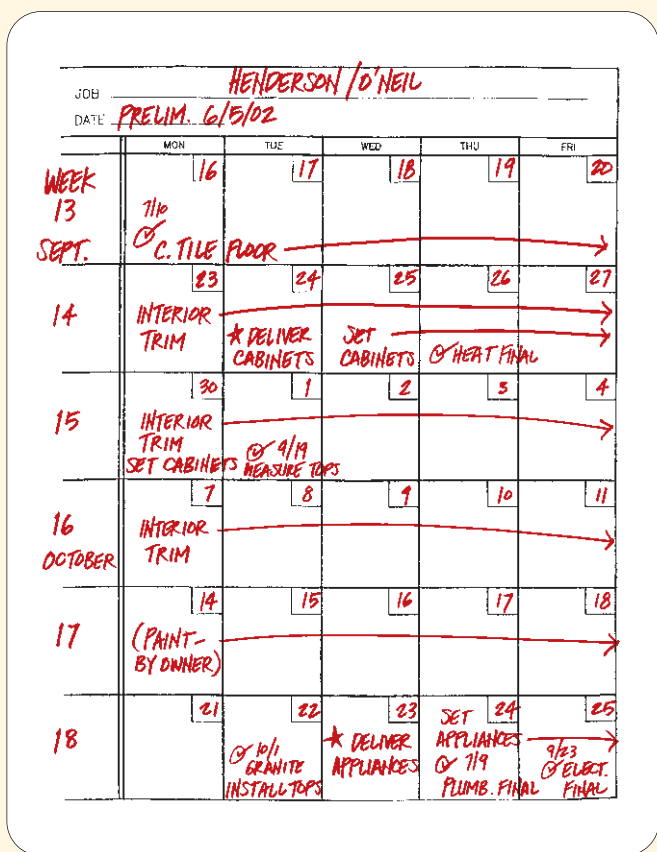
schedule." Kate provides the overall framework for each project's schedule by working from John's labor estimates and consulting the subs on any unusual items. When the schedule reads "Framing," that's the big-picture activity (see calendar, above). The on-site lead carpenter decides the daily and weekly framing details.

We require our lead carpenters to fill out a weekly job planning report, due on the preceding Friday (see pages 4 and 5). Following this plan, the lead carpenter, with Kate's assistance, maps out the daily and even hourly tasks necessary to accomplish the larger goal for that week. All parties are thus prepared, knowing what they need to accomplish, when they need certain materials, and which days subcontractors are scheduled. This process takes care of the day-to-day micro scheduling and doesn't overload the main job schedule with too many details.

Committing to Paper

We've reviewed much of the available scheduling software and have concluded that all the bells and whistles are great. The ability to move tasks and create intricate loops and subjobs provides a lot of detail, and computer-generated (and regenerated) schedules and "subroutines" look impressive to clients. However, considering the time it takes to construct and edit even a computerized schedule, we find that a calendar and a #2 pencil work very well. The pencil is flexible and fast. It doesn't have to be plugged in, and the information it records can be easily altered. Because the schedule is a tool for our clients as well as our staff, it has to be in a format that all parties can easily understand. A calendar provides a simple format that's readily interpreted by all.

We use a five-day week to list all tasks (we never work on Saturdays),



and we can start a project on any week of the month. Each calendar page covers six weeks. The letter-size pages are easy to copy, so no one goes without or has an excuse for ignorance.

Once the facts are laid out on the schedule, we apply a subjective mix of historical analysis and intuitive judgment to our planning. Kate factors all subjective job-site conditions into the schedule; there's no substitute for experience here. Knowing subcontractors' work habits and the time typically required to complete their part of the job is a key ingredient. We know our drywall subcontractor takes ten days, no matter the size of the project. So we give him ten days in the schedule.

We build in time for delays. We know that any time we're ready to remove a roof, or dig a new foundation, it's sure to rain, so we build in some time to cover waiting for things to dry or working in the mud. If the

project occurs over January and February, we know we'll miss a few days because of cold or inclement weather. Holidays and vacation requests must also be factored into the mix. It takes longer to close out a project than you may imagine, or estimate. It's important to be realistic.

After we set up our first draft schedule, Kate calls and confirms all dates with our subs and suppliers to make sure that they can comply with the dates required. If the plumber's crew will be unavailable that day or week, this is the time to find that out, rather than one week before they're due. Our primary plumbing sub is typically booked six to eight weeks in advance, so we try to adapt a new job schedule to coordinate with his, or find another plumber, depending on the situation. Planning the schedule ahead allows us to resolve most problem situations before they occur.

Although there are many variables to consider, accuracy and skills improve with experience. When we hand a schedule to a client, we know that we'll finish on or before the day we specify. Our favorite client line at the final walk-through is always, "Wow, you finished exactly on the predicted date. All our friends told us this would never happen."

Adjusting the Schedule

What about adjusting the schedule? We don't. With a well-written schedule, one that looks at all of a project's variables, there should be no changes to the timetable. If we take on a client who gives us an absolute do-or-die completion date, we cover ourselves by adding several extra contingency days into the schedule. We're confident in our planning and confident that our employees and subcontractors will keep to the schedule

A lead carpenter's weekly planning report predicts the work week ahead. Details are posted to the working schedule to keep all parties apprised and prepared (see next page for more reports).

SYLVESTER CONSTRUCTION				
WEEKLY SCHEDULE JUNE 10 WEEK OF:				
JOB	TASK	CARPENTER	SUBS	
MON	10 DEMO PLASTER LATH @ FT.	CW	FINELINE	
TUE	MORE DEMO @ BASEMENT (FLOOR FRAMING, TILE)	R	LABOR READY	
WED	11 FRAMING BASEMENT PRELIM. @ STAIRS			
THUR	12 BUILD STAIRS FROM MAIN LEVEL TO 2ND FLOOR (INSTALL)			
FRI	13 FINISH FRAMING DOWNSTAIRS WORK ON MAIN LEVEL FRAMING			
SAT	14 MAIN LEVEL COMPLETE START 2ND F LEVEL			

SYLVESTER CONSTRUCTION				
WEEKLY SCHEDULE JUNE 17 WEEK OF:				
JOB	TASK	CARPENTER	SUBS	
MON	17 WEEK TASKS	CW		
TUE	BEAM UPPER LEVEL 1ST RESUPPORT ROOF @ UPPER LEVEL			
WED	18 FRAME HALL AREA (LOWER LEVEL)	CW	R	
THUR	STRAIGHTEN/NECESSARY MODIFICATIONS	CW		
FRI	19 KITCHEN FRAMING STRAIGHTEN WALLS FRAME BATH & CLOSET LANDING @ STAIRS UNDERSIDE @ STAIRS IN ADDIT. & ANY REMAINING FRAMING	CW		
SAT	20 BLOCKING	CW		
SUN	21 BLOCKING	CW		

provided. The only changes we consider are for extenuating circumstances — situations beyond normal. These may be major changes to the project, extended bad weather, or — worst of all — client-driven delays. These include lack of decision making, nonpayment per contract terms, or inability to procure items they're responsible for. But even *with* such obstacles, we're often able to keep to the schedule. In fact, having a fixed schedule helps us motivate our clients to make decisions in a timely manner and uphold their end of the bargain.

If a client chooses granite countertops, we know that it typically takes three weeks from measuring to the install date, and we put that on the schedule. If the decision to use granite isn't made before measurement, the countertop installation will be delayed, as will installation of the new kitchen sink. The impact and result of indeci-

sion are clearly shown on the schedule ahead of time, so delays are normally avoided. We tell clients that if the plumber is scheduled for Monday and doesn't show up that day, there's no need to call us. We're aware of any and all changes and make sure the plumbing is completed when it needs to be. We remind them that the schedule reflects the big picture, and that although small details or items may fluctuate on a daily basis, we are working and managing an overall schedule. It's our responsibility, not theirs, to manage the schedule.

When there's a change to the schedule, it's important to issue a revised schedule to all parties. We handle a schedule revision as a change order. The logistics of notifying all involved — owners, employees, and subcontractors — underscore the importance of providing an accurate initial schedule that won't have to be changed.

Scheduling Multiple Jobs

It's rare to have only one job running at a time. Even a sole proprietor will be preparing for the next job while finishing the current one. We typically run six to ten jobs at a time, which means that we're frequently wrapping up one or more jobs while starting one or more new ones, so the importance of schedules and a system for tracking them multiplies in importance.

Once an individual job schedule is put together, we transfer it, in six-week increments, to the master job board in Kate's office, which lists every job we're on (see the photo on page 1). The job board is simple: a gridded sheet of poster board, mounted to the wall under a clear, plexiglass panel that we can write on with dry-erase markers. Every two weeks, we change the dates and extend the schedule.

There are many useful aspects to the job board. First, because it's mounted

SYLVESTRE CONSTRUCTION			
JOB	TASK	CARPENTER	SUBS
MON	9. BEAM PREP & DEMO. ORDER MATERIALS CONFIRM TRUSS INFO		
TUE	10. BEAM PREP & DEMO FRAMING		
WED	11. BEAM PREP & DEMO FRAMING		
THUR	12. BEAM INSTALL		
FRI	13. REMAINING BEAM DEMO		
SAT			
SUN			

SYLVESTRE CONSTRUCTION			
JOB	TASK	CARPENTER	SUBS
MON	16. FINISH BEAM GROUT POCKET ETC. PREP IN LAUNDRY ROOM FRAME JOIST, WALLS @ ELEVATOR		
TUE	17. DEMO GARAGE WALL DEMO LAUNDRY WALL		
WED	18. FRAMING @ ELEVATOR FRAMING JOIST ROOF DEMO LAUNDRY (TEMP INSULATE TO HOLD HEAT)		
THUR	19. BOYER PREP FRAMING		
FRI	20. BOYER POUR CLEAN UP		
SAT			
SUN			

on the wall, anyone who wants to see what's happening on any job, on any given day, can look at it and see how that job fits into the big picture. It also allows us to see any conflicts in our subcontractors' schedules. We use a group of small contractors who have a limited capacity. With some of our larger subs, we request certain crews to work on our jobs, so it's really important that we don't overbook our subs. The schedule guards against this happening — we can quickly see if one of our drywall contractors is already booked for one project the same week we need them for another, or if the plumber is finishing a project the same day we need him to rough-in another one.


The board also helps us formulate new job schedules — we can see at a glance where we're going to be during the next six weeks. We use a simple set of symbols on the board — subcontractors

are written in colored ink, our staff is written in black. If a sub needs to be called, we place an open circle next to the name; when that person has been called and confirmed for that job and day, we put a checkmark in the circle. Anyone looking at the schedule on the board can glean a lot of information quickly. If anything changes, it's as easy as wiping off the board and entering the new information.

Our subs love to hear from Kate. She provides them with copies of the schedule and calls them periodically to confirm the date. They set their own schedules accordingly and in turn keep us apprised of any conflict. In this way, we've virtually eliminated unexplained no-shows.

Schedule Ready

Scheduling allows us the luxury of planning, instead of reacting to events. It's vital to consider all the

phases, players, factors, and details of a project when putting together a schedule. You must be able to plan for not only absolute details — like confirmed delivery dates, holidays, employees and subcontractor availability — but also abstract possibilities like weather, material availability, and employee or subcontractor absence or illness. It takes a blend of personal experience and job history to commit all of these elements to paper and then commit that time slot to a client. For a busy remodeler, however, a predetermined schedule is one of the most valuable tools available for maximizing your resources. 

John Sylvestre owns and operates Sylvestre Construction, a full-service, high-end, design-build remodeling company in Minneapolis, Minn. Kate Post is the production manager for Sylvestre Construction.