

Keeping Product Selections On Track

by Allison Iantosca

Home-makeover television shows and designer magazines have made the interior-finish selections process a lot harder than it was 30 years ago, when our custom home-building company first went into business. Back then, choices were simpler (harvest gold or avocado green?); today, even the humblest homeowners are hungry for some unique finish or upgrade they spotted somewhere. My job is to manage this process for our \$8 million, 17-employee company.

For many clients, selecting details like plumbing fixtures, tile, appliances, and even paint colors is an emotional process. Accepting this up front is half the battle. The other half is providing strong resources, managing product information, tracking client decisions, and delivering final-selection details in a timely manner to the job site.

Personal attention to clients, a strong relationship with vendors, and well-organized records are key

The selections process is almost never quick or easy — but it should be fun, and your patience and steadiness can boost client confidence. To make the process both highly personal and efficient, I follow a tried-and-true road map, which I describe on the following pages.

Tracking Choices

On a typical large-scale remodeling project, I meet the client at the first or second sales call. These early meetings — when the client describes a vision unhampered by the realities of pricing or buildability — are vital for information gathering. Pen and paper are my best tools: I note every detail and desire.

Later, I pour this information into an Excel spreadsheet template (see Figure 1, page 2). Modifying the template to

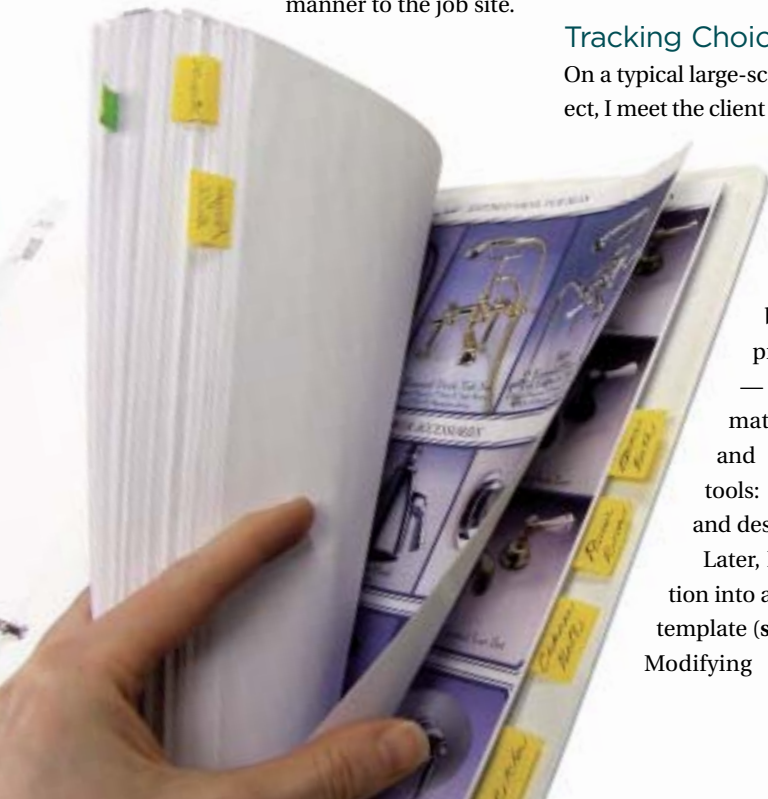
match the current project takes about an hour. For information on design direction or level of finish, I refer back to the presale meeting notes. Then, in collaboration with my production team, I fill in due dates and other important details — any rough-in restrictions, for example — that could affect the selections.

With this preliminary database for reference, I turn my attention to the client and the decision-making process.

Schedules and Decisions

Most homeowners don't realize that plumbing roughs are dictated by final fixture selections, or that tardy decisions can throw a project off schedule. While clients do need to know the ramifications of delayed choices, our company doesn't like to impose penalties for missed selection deadlines. Instead, we use several tools to educate clients about how timely decisions save time and therefore money.

We use a Gantt chart, for instance, to show milestones in relation to install



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dates (Figure 2, page 2). And we ask the client to attend weekly site meetings with the project manager, the designer, and (on an ad hoc basis) support staff like myself to address any budget or schedule changes. When a client can't finalize a detail, these tools help us collectively figure out ways to switch things around to stay on schedule.

In the showroom. A big part of my job is keeping clients on task and pairing them up with experts who can help them with decision-making. These experts work in the showrooms.

Good showroom relationships are critical, because they launch the rest of the project's selections. During the first few months of my job, I spent hours scouting showrooms, looking not so much for the best displays as for a good cultural fit with our company. Did the staff answer the phone well? Did the salespeople really understand the "client first" mentality? Would they be able to work effectively with our sophisticated clientele?

My goal is to find both the right showrooms and the right people at those showrooms. I want consultants who are knowledgeable, good at reading clients' tastes, and adept at quickly narrowing selections down to two or three options. And I want them to understand

Figure 1. The author tracks information during the selections process with an Excel spreadsheet. She begins with a blank template with simple headings broken out by room and item, then modifies and updates it over the course of the project.

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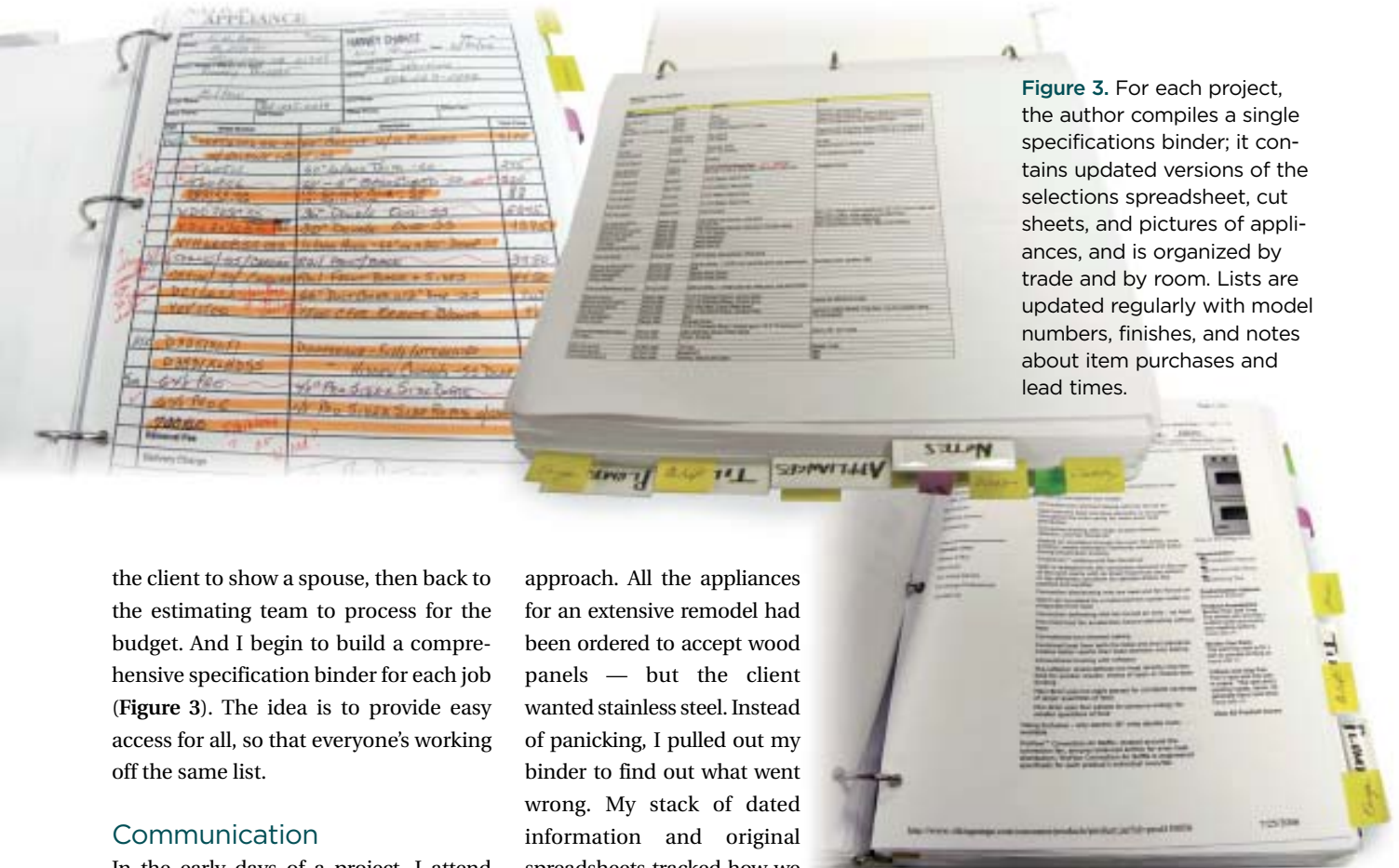


Figure 3. For each project, the author compiles a single specifications binder; it contains updated versions of the selections spreadsheet, cut sheets, and pictures of appliances, and is organized by trade and by room. Lists are updated regularly with model numbers, finishes, and notes about item purchases and lead times.

the client to show a spouse, then back to the estimating team to process for the budget. And I begin to build a comprehensive specification binder for each job (Figure 3). The idea is to provide easy access for all, so that everyone's working off the same list.

Communication

In the early days of a project, I attend weekly site meetings to keep tabs on project development; if I arrive a little ahead of time, I tour the site, keeping an eye out for any project nuances that might alter a previous choice. As the job progresses, I monitor outstanding selections and keep in touch with the project manager about any last-minute additions.

I use e-mail regularly to distribute color-coded spreadsheets and to ask specific questions about fixtures or clearances. Digital pictures and Web images are handy for relaying details and asking questions about finish.

Good Record-Keeping Saves the Day

A recent occurrence at our company illustrated the value of my systematic

approach. All the appliances for an extensive remodel had been ordered to accept wood panels — but the client wanted stainless steel. Instead of panicking, I pulled out my binder to find out what went wrong. My stack of dated information and original spreadsheets tracked how we got to the final appliance order and showed that I was missing an item: the original bid sheet from my client's first visit to the showroom (which she did on her own before contracting with us).

Thanks to my relationship with that showroom, I was able to get its copy of the bid sheet and follow up with the dealer. Even though the appliances were sitting in the warehouse ready to be shipped to the site, the dealer was happy to change out the necessary ones and modify the others. And we were able to ask the client for the cost differential to add the stainless steel. The whole process went smoothly — because of good record-keeping and because I left the solution up to the collective wisdom of my team, rather than placing blame.

Is the process always this simple? No. Every construction project has its share of selection problems, from crazy lead times to vacillating clients. But my goal isn't perfection; I just want to know where I stand on any given item, and provide a quick turnaround should a new item need to be inserted. My selections spreadsheets ensure that we never forget an item, and they force me to write everything down so it's right there at my fingertips when I need it.

That way, every selection change isn't a crisis.

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