

"SMALL PROJECT" MANAGEMENT

From Quotation to Completion
Getting the most from your team



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Coleman Management Services Inc.



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"SMALL PROJECT" MANAGEMENT

Project Objectives

There are four outcomes that a contractor requires on each project:

1. To complete the project on time
2. To complete the project within budget
3. To complete the project to the standards specified (no better; no worse)
4. To maintain the relationship with the client.

For a variety of reasons we often fail to meet all four objectives. The reasons are varied and the solutions are many. The good news is that we can control the majority of the problems that we face and we can minimize or eliminate them by having a professional approach to our project management. The approach doesn't start after we have been awarded the project it starts when the business makes the strategic decision regarding the target market it will serve and must continue on to completion. Doing the wrong work right is not a recipe for success.

The source for this information

We have worked with a variety of "hands-on" people involved in small projects in Ontario, Saskatchewan and British Columbia. More than 70 people provided their input in four workshops that lasted some 17 hours. The participants included owner/managers, sales people, estimators, project managers, foremen, technicians, accountants, administrators and dispatch people. The activities were contracting in residential and commercial fields. All the participants were members of MCA Canada and or HRAI. The projects were generally under \$50,000 in value and usually completed in fewer than 600 hours. We very much appreciate the input of those who participated in providing their insight for this program.

This document should not be considered as the final version. We would be very pleased to receive ongoing input so that we can revise the contents to make this program even more successful.

Please send your comments to: ronald@ronaldcoleman.ca

The Problems we face

1. Difficulty in getting complete information for job proposals 1
2. Taking on work that we shouldn't to keep clients happy 1
3. Agreeing to meet unrealistic timelines to keep clients happy 2
4. Our customers have unrealistic expectations 2
5. General contractor/owner gives wrong information to our contact person 1/2
6. Taking on too much work
7. Difficulties in scheduling and prioritizing jobs
8. Not knowing our work load when we are bidding new work
9. Working beyond our limits/capabilities
10. Difficulty in hiring and retaining good team members
11. Poor estimating – low prices, low margins
12. We don't have a process for dealing with errors and omissions
13. We don't allow for price increases in labour, equipment, materials and subs
14. Not knowing who our preferred vendors and suppliers are
15. Not having a project budget
16. Customers not paying on time
17. Turnover process of jobs from estimating to projects
18. Redoing work that was done improperly
19. Poor processes for completing deficiencies
20. Poor pre-planning by projects department
21. Poor scheduling of materials and equipment delivery dates
22. Too many trips by site people to the wholesaler
23. Poor delegation to our site people
24. Not having a good supply of reliable subs
25. Poor engineering and poor drawings
26. We don't bring decision making down to its lowest level
27. Not managing our "profits"
28. Poor Procurement processes
29. Not managing changes to scope of work effectively
30. Change orders are not approved in a timely manner
31. Not getting the time extensions required

32. We are not investing in our own infrastructure
33. Not doing job post mortems
34. We need a better process for getting the right tools, hoisting systems and equipment to the job
35. Not dealing effectively with inclement weather, other "Acts of God" and other unforeseen conditions and issues
36. Not having a standard format for dealing with customer enquiries
37. Poor communications
38. Not having comprehensive material lists with "required by" dates
39. Not having check lists for all aspects of jobs
40. Proposals are not reviewed by projects team until after award
41. Having poor paper flow

The Solutions

1. Be more selective in what we quote/Learn how to say NO
2. Be realistic in timelines and expectations with customers
3. Improved scheduling and prioritizing jobs
4. Make communications a priority – be prepared to listen
5. Hire and retain more team members (remuneration package/job satisfaction)
6. Ordering and following up on purchases
7. Develop a standard format for dealing with customer enquiries
8. Know our team limitations
9. Have a work load schedule when bidding new work
10. Improve estimating and Proposal process
11. Better delegation of responsibilities to team members
12. See if we can sub out more work
13. Turnover process from sales to projects – “Kick-off” meeting
14. Pre-planning projects
15. Engineering and proper drawings are essential
16. Have a job-by-job material checklist with “required by” dates
17. Have check sheets for the different aspects of the job; safety, clothing, lifts, equipment, drills, materials etc.
18. Establish preferred vendors and suppliers for service/performance
19. Have project people review estimates before submitting them
20. Develop an effective change order management process
21. Have an infrastructure budget
22. Have a project budget and compare actual to budget
23. Do job postmortem
24. Develop systems to deal with the following
 - a. Effective paper flow
 - b. Dealing with errors and omissions
 - c. Getting the right tools, hoisting systems and equipment to the job
 - d. Communications
 - e. Standard format for dealing with customer enquiries
 - f. Dealing with deficiencies
 - g. Checklists for all aspects of the project

The Outcomes

1. Specifications
 - a. How do we minimize the negative impact of poor specifications
 - b. Know when to turn down a request for proposal
2. Timelines on job
 - a. timeline keeps changing – how to avoid hour overrun
3. Putting the right person on the right job
 - a. Sometimes we can't use a particular technician because he is on another job
4. Equipment scheduling
 - a. Getting suppliers to meet delivery schedule
5. Material acquisition
 - a. Reducing the number of many trips to suppliers from the job site
 - b. Avoiding incorrect take offs
6. Stop the sales person from sells cheap to get the order and satisfy the client.
7. Avoid doing free service call on install time
8. Avoid rushing Estimates and proposals due to short lead times
9. Have good Project Administration and Communications
10. Managing the elements more effectively -Weather & other uncontrollable elements
11. Avoid poor quality of workmanship
12. Don't have a lack of tools and equipment
13. Minimize theft
14. Managing poor site conditions, site access & safety
15. Making sure we get paid in a timely manner
16. Have good overall project management

These are major problems and solving them will take systems and discipline. We can have greater control over most of these areas. Our responsibility as managers is to take control. We should be teaching others to do what we know is right. By doing this we enhance the value of our team members by giving them better outcomes and less stress, we keep our customers delighted and our company makes more money. If you were able to minimize the negative impact of most of these items most of the time wouldn't you be creating a legacy that you could be really proud of? It will take time, effort and strategy to obtain these results. But it can be a very rewarding journey.

Reward team members who show initiative in dealing with these issues.

The Actions

1. Specifications

- a. Identify what specifications you are quoting to
- b. Make it a policy to never quote a firm price unless you have all the specifications.
- c. Identify all exceptions that experience teaches you may be an issue.
- d. Where the specifications are incomplete you must add an allowance for "Murphy's Law".
- e. When dealing with a new client add a second allowance for the "new client" factor.
- f. Monitor your profit margins on each job and by type of work and if you are not making a decent gross profit switch to a different market. Your percentage profit should be related to the ratio of labour to other direct cost. The higher the portion of labour the higher the profit required.
- g. With weak or incomplete specifications, you should only run the project on a "cost plus" basis.

2. Timelines on jobs – how to avoid hour overrun

- a. In your quote identify the expected start, the key and completion dates. Only undertake to meet completion deadlines if you start the job on the expected date.
- b. Any delay caused by others in your starting or in meeting key and completion dates should be claimed as an extension of time.
- c. Many small jobs, seem to require the contractor to make numerous trips to site that are over and above what is expected. Include an allowance for these trips. If excessive trips are made identify what caused them and how to minimize them the next time.
- d. If your client is the cause of some of these trips make sure you spell out for them the consequences to them. Submit a change order for additional cost and an extension of time.
- e. Alternatively allow for client created trips. Tell the client that your price includes such an allowance and that if he does not require you to make the anticipated number of trips you will give him a credit.
- f. Bill the client for excessive trips. To do this you need to spell out in your proposal what allowances you have made.
- g. Some of these trips are caused by clients who are disorganized so stop working for those disorganized clients - you are unlikely to make money on their projects alternatively train them to work to your way.

3. Putting the right person on the right job

- a. Having the right employee available for the job is a difficult scheduling problem. Because of the lack of lead time on a project it is not always possible to allocate the best person.
- b. Ensure that you do maximize the pre-planning process so that you can get the right techs there as often as possible.
- c. Never price a job based on your best technician doing the work; always price it based on the average technician, thus there will be rewards for you when you can schedule the best technician.
- d. Offer a bonus to the client if they stick with the proposed schedule and make no changes to the time lines.
- e. Implement a performance based incentive program for team members who exceed expectations.
- f. Cross train your key people so that they can take on a greater variety of projects.
- g. Develop operations manuals to assist them in completing the project.
- h. Identify a "go to" person for each type of work so that when your team members are having difficulty quoting or doing a specific type of work there is a recognised expert they can go to for advice.

4. Equipment scheduling: Supplier doesn't meet delivery schedule

- a. When your supplier quotes you for equipment you should get an availability date from them that they are prepared to commit to for an agreed length of time.
- b. You must place the order as soon as possible to give your supplier the maximum lead time.
- c. You should identify this on your quote, advising your customer that you can only guarantee delivery dates if they place the order with you within the specified time. If they are late placing the order you will have to renegotiate the delivery schedule with your supplier.
- d. Follow up with your supplier regularly to ensure that the equipment is being manufactured. Insist that they go back to their supplier regularly for schedule updates.
- e. Develop a formal procurement process.
- f. Advise your client that equipment installation timeline is contingent on your supplier providing you with the equipment on time.

5. Material Acquisition

- a. Very often the technician has to go to a supplier to get parts. This is time consuming and an unproductive use of time.
- b. Pre-planning your material needs and having proper schedules is critical.
- c. In your handover meeting from estimating to projects make sure that you have a comprehensive list. Otherwise insist that estimating get you the missing information.
- d. Reward technicians who get it right. It is a manager's job to ensure that material lists are complete, not the average technician's.
- e. If you must send someone to the suppliers' try sending them at off-peak hours.
- f. Send apprentices, not qualified technicians.
- g. Have job schedules working far enough in advance to avoid last minute rushes and downtime. Planning at least two days in advance allows you to reassign people on the job.
- h. If some material is not on hand for a specific task there should be other tasks that can be undertaken to avoid quick runs to the suppliers.
- i. Would it be cheaper to phone the supplier and send a courier or a taxi?

6. Sales person sells cheap to get the order and satisfy the client.

- a. Ensure that your salespeople have the technical skills to quote the jobs accurately.
- b. Make sure that the specifications are completed accurately.
- c. Have standard quotation forms with comprehensive check lists.
- d. Remember that smaller jobs require greater percentage profits.
- e. Don't reward your sales team for bringing in lots of work.
- f. Reward your sales team for bringing in lots of VERY PROFITABLE work.
- g. Continually educate your sales team by reviewing completed jobs with them, particularly jobs that proved to be difficult or expensive to complete. Don't make this a witch hunt; make it educational for all parties.
- h. Ensure that your relationships with your clients are based on quality of workmanship, reliability and design ability, everything except price.

7. Free service calls done on install time and other Change Order items

- a. You could include, for an additional fee, an initial service call with your proposal.
- b. Spell out for your technicians exactly what is included in the quote.

- c. Always make sure that your technicians understand the importance of change orders. Any changes to specifications, any servicing of equipment or any other changes to the anticipated work should be recorded and reviewed by the manager before the final invoice is sent to the client.
- d. Where possible get any change in instructions in writing; if they won't put it in writing you should. *"We are completing this task based on verbal instructions of your site manager; this task is not part of the base contract"*.
- e. If you are obliged to do work that you think should be a change then write it out and send the information to your client and your manager – "proceed under protest".
- f. Be constantly on the alert for Change Orders, which will enhance your contract value and profit. Because the average contractor makes 5% pretax profit it takes \$100,000 in additional sales to recover \$5,000 worth of work that you don't charge for. Make sure you charge every dollar you can.

8. Estimating is rushed due to short lead times

- a. If clients don't give you enough lead time to quote a job properly you need to factor in a dollar allowance for that. The mistakes always seem to go against you.
- b. Watch for clients who do this regularly, maybe it's their way of getting a cheap job.
- c. Tell clients that you can give them a fairer price if they give you greater lead times. Also, that you are likely to finish the job on time with the minimum of fuss
- d. Quote budget prices or allowances for areas that you can't get detailed specifications on or detailed prices for materials.

9. Project Administration and Communications

- a. Good project administration and communications is based on five elements
 - i. Documentation
 - ii. Understanding the contract
 - iii. D o c u m e n t a t I o n
 - iv. Knowledge of contract law
 - v. D O C U M E N T A T I O N
- b. Keep all parties informed in a timely manner
- c. Many problems can be avoided by having an effective communications process that covers all parties.
- d. Develop a project procedures manual.

10. Weather & other uncontrollable elements

- a. There are some elements you have no control over, weather, fire, floods, accidents.
- b. Develop contingency plans for keeping your team busy if they can't do site work.
- c. Make sure you keep your customers informed.
- d. Put a small contingency (1 or 2 per cent) in each job to cover the cost of these factors; then when they occur you will at least be getting compensated for them.
- e. Ensure that that you specify in your quote that deadlines will be extended due to uncontrollable elements.

11. Poor quality of workmanship

- a. Hiring the wrong people is worse than not hiring anyone.
- b. Determine whether the "perpetrator" has the attitude to change or not. If not, you must let them go immediately. If yes, provide training and mentoring. This is the difference between someone being willing and someone being able.
- c. Reward those who consistently provide good quality of workmanship.
- d. Reinforce the fact that they are "craftsmen" and should be proud of their calling.
- e. Make sure your apprentices attend school.
- f. Provide training to all your people on new equipment.
- g. Limit the range of products that you install. This will make training easier and reduce the number of errors.
- h. The first mistake is the cheapest. Fix something as soon as you determine it is not to standard; don't try to cover it up.
- i. If they will steal for you they will steal from you. Maintain your ethics; set good examples. Don't encourage team members to pad their time sheets on "cost plus: work.

12. Lacking tools and equipment

- a. Productivity is improved by reducing the labour time on a job. Providing the right tools and equipment will enhance productivity and reduce accidents. You can't improve productivity without changing something.
- b. Determine what tools each person should have and provide them or give them an allowance to do so.

- c. Do an audit of all tools every 90 days. Determine if the person has them with them and examine them to ensure they are in good working order.
- d. Having the right equipment for materials handling is essential. Invest in good quality equipment and keep it maintained.
- e. Ensure that each person has the appropriate tool belts and tool boxes.
- f. Develop a formal procedure for checking tools and equipment. Enforce the procedures.

13. Theft

- a. Prosecute and fire people who steal from you or your customers. No second chances. Explain this policy when you hire people.
- b. Paint your tools a bright colour (e.g. yellow) so that they are easy to identify.
- c. Use a bar coding system to track tools and equipment.
- d. Manage your purchasing system properly.
- e. Don't deal in cash.
- f. Maintain good controls; this will help avoid temptation.

14. Poor site conditions, access and safety

- a. Have your sales or estimating team visit the job site before quoting the job.
- b. Identify acceptable site conditions and access requirements in your proposal. If the conditions or access is not as per your quote obtain a change order.
- c. Ensure your people do not work in dangerous conditions. It can be bad for their health and can increase your workers' compensation rates.
- d. Ensure that you are part of a recognised safety program.
- e. Have your people sign off on the safety instructions and training they receive.

15. Getting paid

- a. Qualify all new prospects to ensure they have the authority to issue the purchase order and the ability to pay for it before quoting them.
- b. Get deposits of at least 30% from new clients.
- c. Take credit cards.
- d. Progress draw jobs that extend beyond 30 days.
- e. Invoice change orders as they are completed.
- f. Have one person in your business whose primary role is collecting accounts receivable.

- g. Divide your customers into A, B, C, D. D customers are the disaster ones. They don't pay, they complain, they give you small amounts of work. Get rid of your D customers. Every year drop the worst customers. Don't waste your resources on marginal work.

16. Overall project management

- a. To make sure that you manage the above 15 points you need to develop good project management procedures.
- b. Get a project management manual (The Alliance Project Management Manual was designed for major projects, it could be modified).
- c. Use this document to develop your own procedures.
- d. Combine with other mechanical contractors and develop a template that you could all use.
- e. Consistent implementation of your procedures is essential. The reason why franchises are much more successful than independent businesses is that they have developed their operations and procedures manual.

APPENDICES

1. Elements of Poor Productivity
2. Kick-off/Pre-Planning Meeting
3. Hire and Retain Team Members
4. Role of Estimator/Sales Person
5. Skills and Make Up of a Sales Person

APPENDIX 1

Elements of Poor Productivity

The reasons for poor productivity can be measured in three separate categories

- Low Craftsman Morale
- Inefficiency
- Progress Delayed

Low Craftsman Morale

- Unqualified foremen
- Tool & material shortages
- Changes & rework
- Frequent foreman turnover
- Uncertain job future
- Weather extremes
-
- Employee Turnover
- Absenteeism
- Substandard employee facilities
- Management/labour conflict
- Adverse site conditions

Inefficiency

- Support equipment missing
- Inadequate instructions
- Crowded work area
- Cluttered work area
- Double handling of materials
- Poor sequencing of work
- Poor work area lighting/heating
- Materials not on hand
- Tools not available
- Excess workers for task
- Poor site access
- Stacking of trades

Progress delays

- Complex design
- Incomplete design
- Unclear specifications
- Design build work
- Procurement delays
- Strikes/shutdowns
- QA/QC requirements and inspections
- Delayed or poor decision making

I would recommend that you develop this as an audit procedure. Identify the elements that relate to your work. Rank each item on a scale of 1 to 5, with 1 being unacceptable and 5 being excellent. Have reports completed regularly and identify patterns of poor productivity. Take the appropriate action to minimize the negatives and accentuate the positives.

Work that is poorly quoted and/or badly executed can impact all three categories.

APPENDIX 2

Kick-Off/Pre-Planning Meeting

This meeting should be held immediately the job has been awarded.

Objectives

1. Hand over the job from estimating to project management (if needed)
2. Develop the strategies for completing the project on time, on budget, to standard and maintaining the customer's goodwill.

Who

- All the parties who are involved in the management of the project should attend. Project manager; estimator, purchasing agent; expediter, safety officer; foreman; accounting.

Handover of job from estimating to operations

- Review plans, specs, contract, addendums, clarifications
- Review of construction process by estimator
- Develop Schedule
- Identify and assign manpower
- Review material and equipment requirements
- Order all materials, equipment and sub trades
- Determine storage requirements
- Start daily job journal
- Do safety assessment
- Introduction to client/ reps
- Obtain/develop Job site manual
- Obtain/develop shop drawings
- Coordinate Sub trades
- Identify tools/equipment required for job
- Identify any other special requirements for the project
- Acceptance by PM of project and cost estimate from estimator

Give everyone an overview of the project

- Specifications; drawings
- Identify opportunities and challenges
- Anticipate possible problems and opportunities and maximize the benefits and minimize the problems
- Assign each team member their responsibilities
- Give everyone the available documentation
- Job journal, job file
- Identify list of contacts – general, owner, consultants etc.
- Identify if we will do preplanning meeting or if this is it. If it then add preplanning items

Construction schedule and the client

- Review the schedule
- Consider possible schedule revisions due to inclement Weather, Long deliveries of equipment, delays due to other trades, use of change orders
- Determine how to handle delays caused by the client
- Don't accept unrealistic deadlines and how to deal with them
- Identify and work on design problems immediately

APPENDIX 3

Hire and Retain Team Members

People don't leave Jobs, they leave bosses

- Based on your projected workload volume and type of work identify your needs. Where possible hire apprentices.
- It is preferable to provide full 40 hour week basis. This will help keep your people but it can also create unapplied labour if you don't have sufficient billable work for them.
- Support apprenticeship programs.
- Research pay scales and make sure we are competitive. You should not have to pay over the rate.
- Research benefits packages health & welfare; clothing, tools, bonuses, training, vacation
- Provide Performance Bonuses for exceeding expectations.
- If you provide company vehicles make sure the recipients understand the income tax implications
- Identify career path advancement
- Offer a variety of interesting and challenging work
- Offer flexible hours where possible and if it suits your team members.
- Pay for actual hours billed. Try to avoid unapplied time or at least keep it to a minimum.
- Regular performance reviews
 - ◆ Two way - what's working and what's not
 - ◆ Magic wand- what one thing would you, the employee, wish to change?
 - ◆ What contributions have you made? What has the company done for you?
 - ◆ Provide a self assessment evaluation form.
- Advertise through wholesalers, your website and side of truck
- Get your employees to recruit – give them a bonus when you sign up someone they recommend and a further one after 6 months
- Team events – pizza day; bbq; Christmas party; leather jackets
- Be consistent in dealing with your team members.
- Schedule work to minimize the travel time of your team members. Where appropriate don't quote work in areas that are difficult for your team to get to easily.

APPENDIX 4

Role of the estimator/sales person

Many HVAC companies have a dedicated sales person.

The role of the sales person is so sell HVAC products, installations and planned maintenance programs at a profit and to monitor customer delight.

Their duties would include:

- Develop a process for getting Requests for Proposals and follow it diligently
- Use a contact management program and keep it updated
- Work with your team to generate sales leads
- Represent your company to the client, his representatives and others that you will interact with in a professional manner. Focus on both the technical and business aspects of your work
- Follow up on leads and referrals in a timely manner
- Make sales presentations to prospective customers
- Make follow-up calls to customer on completion of the project
- Have an effective management process from the initial enquiry to the hand over to the field
- Administer the contractual aspects of the project bidding process to maximize profitability and minimize risk
- Assesses projects and prepares bids for tender and negotiation based on customer specifications
- Prepares or reads drawings and all pertinent data in order to prepare proposal.
- Develops the execution plan for all proposals
- Make sure that all information flows to the appropriate people in a timely manner
- Ensures that all customer complaints are addressed promptly and in a fair and objective manner
- Assists in collection of disputed customer accounts
- Adheres to Company policies including but not limited to professionalism and safety.
- Has minimum absenteeism and arrives at appointments promptly
- Completes work within expected periods of time
- Analyzes profitability of customers and projects

- Develop a profitable planned maintenance program
- Develop a strategy for selling planned maintenance
- Implement the process
- Performs other tasks as assigned

APPENDIX 5

Skills & Make Up of a Sales Person

Skills

- Logical thinking
- Able to make sound decisions
- Good communications
- Team leadership
- Planning
- Prioritizing
- Ability to handle a crisis
- Entrepreneurial thinking
- Good attention to detail
- Good reading and writing skills
- Systems oriented
-
- Estimating
- Organizational
- Technical knowledge of mechanical/electrical systems
- Technical knowledge of construction systems
- Not letting other intimidate him/her
- Good listener
- Ability to develop an appropriate proposal
- Ability to price the proposal

What to Look For In a Successful Sales Person

- Profit orientated
- Clear and concise communications
- Self-motivated
- Assertive
- Disciplined
- Will meet deadlines
- Works well in a stressful environment
- Can prioritize activities and processes
- Analytical and attentive to details
- Customer focused
- Systematized
- Self confident
- Team leader
- Enthusiastic
- Persistent and consistent
- Formal education and a solid track record
- Good decision making ability
- Ethical and prudent
- Able to deal with a broad range of people
- Track record in sales/estimating
- Reasonable level of technical knowledge

You should edit these lists to ensure that they are relevant to your needs, then develop a series of questions and or tests that will help you identify how your candidates relate to each of the key points.

Ask open questions about their experiences that will help you identify the elements that you seek.

- Tell me about some of the proposals that you have developed
- What challenges have you had to overcome?
- What did you learn from these projects and challenges?
- What would you do differently as a result of these experiences?
- What procedure manuals have you used?
- Have you ever developed any?
- Have you brought any with you today?
- How do you recommend handling the handover of the project from sales to the project management team?
- What are some of the financial indicators you would use to manage your productivity?
- What are some of the non-financial lead indicators that you would use to manage your productivity?
- What would you do when you the client complains to you about the quality of the job or the process or that the work is not as specified?

Why not give them these questions in advance and ask them to prepare for the interview in this way? This will give you an opportunity to evaluate how they prepare for a client meeting. After all, getting this job should be one of the most important sales job they will ever do (from their perspective). Have they pre-planned the interview? Have they anticipated other questions? Are they assertive in sticking with their perspective or can you intimidate them into changing their principles.

- Develop a process for getting Requests for Proposals and follow it diligently.
- Use a contact management program and keep it updated
- Work with your team to generate sales leads
- Represent your company to the client, his representatives and others that you will interact with in a professional manner. Focus on both the technical and business aspects of your work
- Follow up on leads and referrals in a timely manner
- Make sales presentations to prospective customers
- Make follow-up call to customer on completion of the project

- Have an effective management process from the initial enquiry to the hand over to the field.
- Administer the contractual aspects of the project bidding process to maximize profitability and minimize risk.
- Assesses projects and prepares bids for tender and negotiation based on customer specifications.
- Prepares or reads drawings and all pertinent data in order to prepare proposal.
- Develops the execution plan for all proposals.
- Make sure that all information flows to the appropriate people in a timely manner.
- Ensures that all customer complaints are addressed promptly and in a fair and objective manner.
- Assists in collection of disputed customer accounts.
- Adheres to Company policies including but not limited to professionalism and safety.
- Has minimum absenteeism and arrives at appointments promptly.
- Completes work within expected periods of time.
- Performs other tasks as assigned
- Analyzes profitability of customers and projects.
- Develop a profitable planned maintenance program
- Develop a strategy for selling planned maintenance
- Implement the process.

Three final points in recruitment

1. It is very important, as part of the hiring process, to check references very carefully. Your final question to the referee is "would you hire this person again?"
2. Have an exit strategy for the employee if they don't work out. Share it with them before hiring them and put it in writing.
3. In the offer of employment letter that the candidate signs there should be a clause saying that on termination of employment the employee will be entitled to compensation in accordance with the minimum requirements of the relevant labour laws. (Get your lawyer to word this for you).

Checklist of duties

- Bid information form: This is completed by the person receiving the enquiry and passed to the estimator/sales person.
- Assign project number
- Visit site if appropriate or check your company files for previous work at that location
- Complete the project site visit checklist
- Review project with a field person for their perspective
- Complete the project review form
- Identify critical path items and long-lead times
- Prepare the estimate in the same process that it will be built. This should also be in compliance with job cost reporting
- Evaluate if this is the type of work you want to do. Pass on it if it is not so
- Complete the proposal carefully.
- Prepare site map, location details and special site conditions
- Identify key operational constraints
- Price the job to maximize return to the company without alienating the client
- Keep a bid tracking summary and follow up.
- Review jobs lost and determine why
- Review jobs awarded and determine if you could have had a higher price.