



Estimating Service Tries All, Picks Just One

When Stanley Shook decided to go out on his own into the professional electrical estimating business, he took McCormick Systems software with him.

Shook had 14 years of industry experience behind him, including time working for contractors (as a project manager/estimator) and time working with them (as a salesman for wholesalers). It was 1998. Shook thought he knew the business well enough to start a company that specialized in providing electrical project estimates.

Turns out he was right. Today TakeOff 16 (Petaluma, CA), his company, has three full-time estimators (in addition to Shook) and several semi-retired or part-time professionals. The company provides what Shook calls "a very accurate electrical take-off and estimate" to contractors, using six McCormick-powered estimating workstations.

"We don't give them a ballpark figure," he adds. "It's not a per-square-foot figure. There are guys that just do quantity take-offs—we go beyond that."

"For a small shop—let's say, run by an owner and a senior partner who are the only estimators and project managers—they can be overwhelmed. They are managing manpower, coordinating materials and tooling, and negotiating jobs with clients, and much more—full time. Then, right on top of this, there is the need to estimate two or three jobs.

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Item #	Item Name	Quantity	Book Price	Adj	Est Price	Labor	Adj	Est Labor
Category = 100 Pull/Junction Boxes								
16190	12"x12"x6" N1 S/C JBOX	11	\$30.75	E 0.85	\$104.31	1.00	E 1.00	11.00
16304	CIRCLE AIR 1824TCS	1	\$115.80	E 0.85	\$98.43	1.50	E 1.00	1.50
16364	6"x6"x4" 3R PULLBOX	12	\$12.35	E 0.85	\$125.57	0.20	E 1.00	2.40
16381	12"x12"x6" 3R PULLBOX	2	\$31.10	E 0.85	\$62.87	1.50	E 1.00	3.00
16385	15"x18"x6" 3R PULLBOX	4	\$50.80	E 0.85	\$206.72	1.75	E 1.00	7.00
16387	24"x24"x6" 3R PULLBOX	1	\$136.70	E 0.85	\$89.86	2.00	E 1.00	2.00
60162	24"x24"x6" NBR HINGED	5	\$125.00	E 1.00	\$625.00	1.50	E 1.00	7.50
					\$1,392.85			\$6.48
Category = 100 Branch Bunch								
701	1/2 EMT	5,894	\$42.31	C 0.80	\$1,496.25	3.00	C 1.00	206.29
702	3/4 EMT	1,988	\$75.57	C 0.80	\$991.40	4.00	C 1.00	79.52
703	1 EMT	1,240	\$134.20	C 0.80	\$998.45	5.00	C 1.00	62.00
795	1/2 EMT CONN SISA	658	\$126.92	C 0.80	\$900.78	5.00	C 1.00	32.88
796	3/4 EMT CONN SISA	186	\$205.03	C 0.80	\$204.11	6.00	C 1.00	9.96
797	1 EMT CONN SISA	25	\$339.24	C 0.80	\$50.48	8.00	C 1.00	1.98
819	1/2 EMT CONN SISA	6	\$189.34	C 0.80	\$6.74	5.00	C 1.00	0.30
820	3/4 EMT CONN SISA	2	\$222.36	C 0.80	\$2.57	6.00	C 1.00	0.12
865	1/2 EMT COUP SIS	684	\$125.44	C 0.80	\$479.34	0.00	X 1.00	0.00

TakeOff 16 is the estimating department for smaller companies. These companies are counting on us to be accurate. If we can do that, our service frees up their time....they can go and spend their time managing jobs, and negotiating with clients.

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"Typically, these two will do it early in the morning or late at night. Or on weekends. As they get tired, the likelihood of estimating mistakes goes way up.

"TakeOff 16 becomes the estimating department for the smaller companies that use us. They're counting on us to be accurate. If we can do that, our service frees them up—they can spend their time managing jobs, and negotiating with clients."

Other Clients

The company's business is not limited to small contractors. "For the medium to larger contractors, we become an overflow resource," Shook notes. "Someone gets sick, someone goes on vacation—they call us. Sometimes, their department is already too busy, and they assign projects to us.

"Some larger contractors specifically use us for jobs with a low 'win' percentage—like public works. Some have decided to maintain their in-house estimating staffs for specialty work, design-build work, and negotiated work, and give anything else to us."

Shook's business depends on producing accurate, useful estimates for his clients; after all, that's the only thing it provides! Getting it right the first time isn't a goal, it's the only way TakeOff 16 can survive.

"We say the word 'estimate' lightly, because the contractor really completes the estimate," he says. "What we do is the take-offs. We're doing materials and labor-quantity take-offs for our customers. We provide all of the information the contractor needs to put his figures, his quotations, and his labor rates. I tell possible customers that 'we take you to bid day.'

"We'll go further as well. We'll work with lighting reps to make sure the fixture package will be current. We'll work with the subcontractors to the electrical contractor, to make sure we have obtained the correct price from them, based on the right information.

"Our customers can rely on us. If our estimate says the job will take 2,000 hours, they can be fairly certain that the job is pretty much going to be close to that."

One Type of Software

Shook had used McCormick software in his days working for contractors. But as part of starting a business, he made sure he looked at all of the alternatives. He says he's actually used software from four other electrical estimating software providers.

Yet the only electrical estimating software used at the TakeOff 16 offices is from McCormick Systems.

"I've used the other estimating programs, but for speed and accuracy in doing take-offs, McCormick is the best and fastest. The primary advantage for us," Shook says, "is the multiple take-off windows. I can open up five or seven screens, each one showing a different item or assembly to choose from. This allows us to count so much faster.

"Also, the feature of creating temporary job items and assemblies is very fast and simple with McCormick. This is a very critical thing for us, especially when we use the part-time estimators. It is so much easier with

McCormick to maintain our database. It is just better for that than the others."

Actually, there is another type of software regularly used at TakeOff 16: Microsoft Excel. TakeOff16 has developed a spreadsheet approach (which they call the E-extension—see the company's Web site, www.takeoff16.com, for more information).

With the E-extension, the company's estimators export McCormick data into a customized spreadsheet program. This allows TakeOff 16 to send estimates to virtually anyone with a computer...even contractors that do not use McCormick software.

"By using the E-extension, our clients can manipulate all of the data we've given them prior to coming up with a bid," Shook explains. "They can change quantities, material prices, discounts, labor units—whatever. With each change, the spreadsheet automatically re-extends, and gives them new totals.

"There's also a complete bid summary, very much tailored after McCormick's bid summary."

The logo for TakeOff 16, featuring the word "TakeOff" in a bold, sans-serif font, with "16" in a larger, stylized font above the "FF".

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Did You Know ... The **JOB NAME** in the Jobs screen can include a Job Number and still be able to be both SORTED and SEARCHED normally.

'Find A Job To Bid' On TakeOff16's Web Site

Few electrical contractors can visit www.takeoff16.com, see the "Find A Job To Bid" logo, without clicking on it ...just out of curiosity. *What's going on here?*



Stanley Shook and his staff are providing free information on government and public works jobs in four Western states. "We go to all kinds of Web sites—counties, cities, and others—and we look for jobs just as if we're the contractor. What this amounts to is pre-qualifying projects for the electrical contractor."

While he has set a goal of serving a wider area with "Find A Job To Bid"—eventually, the entire U.S.—Shook notes that there is a struggle in his mind. "Right now, it's free, and we'd like to keep it free," he says. "But it takes a lot of time and effort now, so we're sure that expanding it geographically might put a real strain on us."

"Our primary goal is to be the best electrical estimating firm in the industry. The services we offer on our Web site are great tools for our clients, who want to be more successful and find more quality projects to bid on. Contractors that visit our web site see that we are serious and they see the quality." ✕



Did You Know... The DATABASE MAINTENANCE should be used to BACKUP the parts database whenever major work to the database is being planned, including specifications, formulas, range editing and even pricing, if it is in doubt.

What You Will See In Our Booth

Attendees at this month's IEC trade show (Sept. 12-13 in Tampa, FL) and the Oct. 6-8 NECA Show (Chicago) can take a detailed look at all of the improvements McCormick Systems has made to its software—in our new Version 7.0.



These include:

Complete Flexibility—thanks to the ability to edit extensions, contractors can edit every aspect of the estimate after it is complete—individual labor units, specific product prices, or entire portions of the job.

Update Estimate—a bid might be a winner, but the job might start months later. Estimators can now update prices and labor costs months later—while still holding key segments of the estimate as they were.

There's much more in Version 7.0, an upgrade to Win 3000, 6000, 8000, and 12000 systems – including:

- ▲ The capability to add, delete, and swap material;
- ▲ Multiple views of your extension (by cost code percent, by code cost, etc.); and
- ▲ You can send total price and labor to any bid summary.

If you'll be at either event, don't miss the opportunity to stop by our booth, say hello, and perhaps learn something useful! ✕

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What about the future? Is Shook sticking with his software supplier? "I've looked at [Version] 7.0, and all of the upgrades are right in line," he says. "McCormick is probably the industry leader in upgrades.

"They continue to come out with new features. They're always upgrading, always trying to come up with something better. For instance, I love the software's graph features and scheduling features.

"But what's more important is that they've listened to the things I've wanted to have changed. I've told them what I thought could be improved—and they've done it!" ✕

Estimator's Corner

Using Labels for Job Costing



Some contractors define the Labels for Job Costing at the estimate; other contractors re-do the take-off for Job Costing after winning the job. Either way, most jobs will need to be broken down in areas for job management purposes. The following tips may help in that breakdown.

- Divide the job into logical sections for job costing purposes. Try not to make the divisions so small that it is difficult to obtain the information from the field or too time-consuming to process in the office.
- As you develop your labels, remember that the Cost Codes are a part of the estimating system.
- Examples of label breakdown could be:
 - ✓ Additive or deductive alternates;
 - ✓ Change Orders;
 - ✓ Sections of a slab, if there is extensive underfloor or slab work;
 - ✓ Areas of a building that can be easily separated for job costing purposes;
 - ✓ As per our Label example in the Sample Job, buildings, floors, systems, and so forth, are good areas to break down;
 - ✓ Systems or new types of construction may be separated for future estimate analysis;
 - ✓ An area of the job that you think may be deleted or modified because of cost cutting or other reasons.
- Labels may also be used for the release of materials. This will help cash flow, cut down on theft, and reduce breakage due to moving the material a number of times.

Unique approach—One contractor we know had his estimators estimate the job. If the contractor was awarded the work, he then brought in supervision (a foreman or superintendent) and had him estimate the job. Then the supervisor and the estimator would look at where they differed—and compromise on the final figures. This way the supervisor has accepted the final compromise as a number that can be accomplished and is totally familiar with the job. ✕

Next month: "Starting the Takeoff."

Get Windows Training Now!

Standard Estimating

The class is structured to take you from "Job Startup" through "Bid Summary". It provides in-depth instruction, including good manual experience and "brush-up" exposure for those who want to get more out of the product.

Advanced Management

Designed for the database manager or chief estimator, this class drills down into the bottom of the program. You will learn how to build specification formulas, write reports and reports formulas, and more. Before taking the class, you should be proficient in all takeoff phases of the product and understand your company's needs.

Upcoming Schedule

Unless specified, all classes are at the training center in our office in Chandler, AZ. Classes start at 7 a.m. and wind up about 4 p.m. daily. We make hotel reservations using information from the registration forms sent in from participants. We must receive your registration form in order to reserve a space in our class. To obtain a registration form, call 800-444-4890. ✕

September 18-20
Standard Estimating

September 19-20 - **Baltimore**
Standard Estimating

October 3-4
Standard Estimating
(before NECA Show in **Chicago**)

October 23-25
Standard Estimating

November 13-15
Advanced Estimating

November 20-22
Standard Estimating



Did You Know ... The LEAD ESTIMATOR in the Jobs screen will show whoever the job is created by or assigned to.