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# Insights

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*Estimating to Project Management*



# LEVERAGING PRODUCTIVE STRATEGIES from *Estimating* to *Project Management*

By Jeff Burmeister and  
Paul Wheaton

**E**stimating and project management software is a requirement these days, but by just owning software or by not using the software to its fullest, processes can still be missed and important information can be forgotten. By learning all features and advantages of software, an electrical contractor can create productive strategies that can increase profitability and decrease costly mistakes. It is imperative that a contractor comes up with a list of checks and balances that can be utilized on every single job, every single time.

A number of electrical contractors are still using a combination of Microsoft Word templates, Excel spreadsheets, outdated programs, even three-ring binders. This manual approach is both risky and unproductive. Fortunately, there is a better alternative—one that enables the electrical contractors to estimate and document projects more thoroughly yet spend less time managing paperwork. The solution: a centralized and industry-tailored estimating and document management system.

Following the lead of construction firms, electrical contractors are striving to estimate and document every project thoroughly. But unlike the large construction firms, the majority of electrical contractors have yet to adopt software that is specifically designed for them. These software programs are needed to provide that list of checks and balances that a contractor should not live without.

Beginning with estimating software, a good program will allow you to set up the job in an appropriate manner in order to properly manage the job through project management software. This is a must; if the estimating software does not set up the job properly, it will be very difficult managing that job after it begins. The whole purpose of the set-up is to manage the job more efficiently and effectively and drill down to any aspect of the project.

Estimators can work with digital takeoff programs to collaborate plans on the computer instead of having endless stacks of paper that only one person can review at a time. With digital takeoffs, an estimator is able to send their plans to other employees or project managers via e-mail. This also increases the success for the job because everyone has access to the plans and how the estimator took it off, giving the ability to see circuits, homeruns, changes, and additions on a copy of the original plans. Everyone having access to one set of plans from their own computer greatly increases the success of the job and lessens the possibility for prejob mistakes.

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An estimating program can break down a job into logical sections like floors, offices, or sheets. With these breakdowns, a project manager could then run specific reports on a section. Say my workers are going to install second-floor lighting today. The project manager would be able to run a report on that specific part of the job and see exactly how

are tucked away in file folders and file cabinets.

Fortunately, there is a better alternative—one that enables the electrical contractors to document projects more thoroughly yet spends less time managing paperwork.

The solution is a centralized and tailored document management system.

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many man hours were bid, material lists, cost of material, and schedules of that specific section of the job. Having this knowledge and ability greatly increases the success of a job before the job is even close to being complete. Estimating and project management software gets the contractor away from the old “cross your fingers after a job is complete and hope you will make a profit.”

Realizing how critical project management has become to project and financial success, electrical contractors have been placing a greater emphasis on finding a project document management solution.

Razor-thin margins have forced the industry to cut costs and be more productive with a leaner team. The homegrown manual systems most contractors are using to manage project documentation—word processing software, spreadsheets, paper, three-ring binders, and expanding rows of filing cabinets—make productivity difficult as they are simply not efficient document management tools.

These approaches force already overworked project managers to spend more time in the office managing paper and less time making jobsite visits, developing creative solutions to project challenges, or growing client relationships.

Manual approaches are also error prone and risky. Documents are rarely centralized in one location. Project files or binders are often pulled from their locations and not returned. Document numbering and logging require separate log files. Project managers develop tracking methods and systems others cannot easily follow. And no reliable form of reporting or flagging can be created when thousands of documents

A document management system designed for electrical contractors that allow you to document, communicate, and archive project information in a consistent manner across all projects. These systems help create, manage, and track everything from requests for information to transmittals, submittals, general project correspondence, project-related e-mails, change order requests, daily reports, phone conversation logs, and much more—all through a single, centralized database.

In fact, electrical contractors that adopt a system find that productivity improvement is often the single biggest driver of return on investment. That's because these systems today automate time-consuming yet important steps such as document numbering, entering of repeat data (e.g., project name and number, general information, the contact's name, address, and phone number), and other necessary but ordinarily time-consuming steps

### Built for the Electrical Contractor

Estimating and project management systems, which are built around the way electrical contractors run projects and interact with project stakeholders, tend to enjoy higher internal acceptance and adoption rates. Conversely, generic, broad-based systems that are designed for the construction industry usually must satisfy the requirements of construction firms. As a result, not only do these generic systems often fail to address the uniqueness of the electrical trades,

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# Special Feature

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but their complexity can also create user confusion and resistance. They also tend to cost significantly more since they often come prepackaged with a significant number of bells and whistles most electrical contractors do not need.

Finally, it's important to work with a technology partner that understands the unique challenges and requirements of electrical contractors. Electrical contractors have been using systems such as McCormick Systems and Project DocControl to streamline the process of estimating, creating, and tracking their project documentation for years.

## INSIGHTS

*Jeff Burmeister is President at Project DocControl. As President, Mr. Burmeister leads product implementation, marketing, and partnership alliances of the Project DocControl product, a project management documentation and collaboration tool designed specifically for specialty contractors. Mr. Burmeister has more than 10 years of construction industry experience working for Pepper Construction based in Chicago and J.A. Jones Construction based in Tampa, Florida.*

*Paul Wheaton is the Vice President of Sales for McCormick Systems. He has worked closely with the newer development of McCormick and is on the front line of computerized estimating. He also instructs on the McCormick line of estimating products and develops procedures for e-learning. Paul holds a Bachelor of Science degree in Business Management and is Project Management certified. Paul has been a guest speaker at numerous conferences, trade association meetings, and IEC Conventions.*

*Burmeister and Wheaton's session, "Leveraging Productive Strategies from Estimating to Project Management," will take place Thursday, September 26 at 2:15 p.m. at the 56th Annual IEC National Convention & Electric Expo in Portland, Oregon.*

