

CHECKLISTS KEEP CREWS RUNNING SMOOTHLY

by Tara Landes

Outsideers have little appreciation for how difficult it is to profitably grow your contracting business. The more time you spend in the office bringing in the next project, the further removed you are from wearing a tool belt in the field.

This results in a gap in oversight and a greater challenge to bring jobs in on time and on budget. Using checklists to manage your crews will save you time, improve customer retention and satisfaction, and have a significant impact on your earnings.

A recent client met this advice with a heavy dollop of skepticism. “My guys have been working jobs like this for decades. Isn’t a checklist a little simplistic for an experienced crew?” My answer was, “Yes – so why aren’t you doing it?” Checklists should be employed when the cost of forgetting outweighs the cost of creating and using the list. For example, a pilot may fly the same route day after day for 20 years, and yet he goes through a checklist every time he takes off.

The evidence for checklists is overwhelming and yet many industries have not adopted them. A popular example these days is with surgeons. Again, it’s a group of highly educated, experienced people who complete similar, routine tasks every working day of their lives. Yet, the *New England Journal of Medicine* published evidence this year that implementing surgical checklists reduced patient mortality rates by half and patient injuries by a third.

In the contracting world, checklists can be employed in every facet of the business from prospecting lists to equipment maintenance. Three that we have found to be particularly impactful are the Project Supply, Project Initiation and Customer Quality Checklists.

Every project should have a Project Supply Checklist encompassing everything from equipment used on the job to the consumables. How many consum-



ables have been forgotten at the shop (or never purchased in the first place) forcing the entire crew to sit idle while one person retrieves it? How many tools have been accidentally left on site never to be reclaimed? The cost of time associated with these errors can be in the tens of thousands of dollars, not to mention the actual equipment itself, ill-will of customers when their jobs have been held up, and general staff frustration.

The Project Initiation Checklist acts as a written work instruction. It is a communication tool that ensures everyone involved in the project from the person who sold it, to the crew who completes it to the client who commissioned it are all working to the same plan. How many jobs have been worked to perfection only to find out that the sales person forgot to tell the crew that one detail? Or to have the customer remember their request differently than it has turned out? The checklist is developed by the sales person in conjunction with the crew supervisor. The customer also signs off on it at the project kick-off meeting indicating that yes, this is the scope we discussed.

A Customer Quality Checklist can be a powerful tool in your relationship management arsenal and is the easiest one to implement (once the initiation checklist is

in place). Instead of relying on the crew supervisor to report the job is complete, the checklist inserts another level of quality management – the customer. Ideally, the supervisor walks the job with the client to address any last-minute concerns or overlooked items immediately. The beauty of this process is it makes the crew accountable to the client, ensures client satisfaction, and reduces the likelihood of the crew being called away from the next job to handle a complaint from the previous one.

The case for checklists in the contracting world is overwhelmingly clear. Companies that are already using them have found they can make more margin on each job and go in lower in competitive bids. So why doesn’t everyone use them? Discipline. The challenge is finding the time at the beginning of a job to save time and money at the end. Knowing what to do is one part of the equation. Getting people to do it is the other. Changing the attitudes, beliefs and actions of the employees in your organization is no easy task but it is a task worth the investment.

Tara Landes is president of MRSI Benchmarking Inc.

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