

# Your Agenda for Preplanning Success



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Recently I had the pleasure of working with a contractor who has multiple locations. The focus was primarily on the need for and how to conduct a pre-construction meeting. This wasn't

a large general contractor we're talking about but a contractor who depends on multiple locations to get things right...the first time.

As a rule, the "GC – CM" companies have normally included the pre-construction effort as part of their pre-planning. However, with more contractors of all size and specialty realizing the narrow profit margins to acquire work, the need to insure that "costs of goods sold," or what most of us call our "direct costs," are executed as estimated, the need to prepare has never been greater.

In this article I will provide a short, but powerful agenda that you can adopt to conduct your own

pre-construction meeting. (For more information about pre-construction, check out [www.thecontractorsbestfriend.com](http://www.thecontractorsbestfriend.com).)

## The Pre-Construction Meeting - Agenda

### I. Present a General Scope of Work

Whoever sold the project needs to clearly communicate what the "big picture" looks like before getting into the weeds of the project. Often pictures are worth a thousand words but pictures taken with our smart phones don't always display the needed information. It's always important to take pictures of the more complicated areas, not leaving it to our crews to figure things out when they get arrive to the site.

### II. Discuss Client Profile, "Out of the Ordinary" Issues, & Expectations

While your crews may perform similar work from job to job, the one distinguishing difference will be the

customer. Again, whoever has had the relationship with the customer needs to debrief the Crew Leaders on what sort of customer are they, i.e. Are they high maintenance, nit-picky, laid-back, etc. This part of the agenda should also invite any unusual or more difficult item to discuss. It's the "out of the ordinary" issues that most often get discussed so don't forget the more mundane efforts needed. Finally, whatever expectations the customer has or you as an owner have for the project needs to be shared and clearly understood.

### III. Discuss Specific "Non-Negotiables" and Documents

What does your company require your crews to comply with and what documents are needed? What does your local city, county, or state require in the form of documentation? Finally, what federal laws are you required to secure and maintain with the appropriate documentation? Sorry for the great reminder but as contractors we cannot allow any one in our company to jeopardize the legitimacy of our business because we were not on the ball and in full compliance with any formal process or law.

### IV. Discuss the Project's Building Process

Now we're at the portion of the meeting that too often gets discussed either while the crews are on their way to the site or have just arrived to the site. It's critical that whoever sold the job communicate how they initially processed the job in their head, and transferred it to their estimate. Then, with the crew leaders engaged, the constructibility of the job can be openly discussed, with changes discussed if needed.

If you are a contractor who might complete more than one project a week, then you may wish to move through several projects during this pre-planning effort. No matter your project size, it is critical that the folks who sold the job, estimated the job, and who will execute the job meet to discuss the actual construction process best suited for the project in review.

### V. Produce a Final Next Week Look Ahead/Job Schedule

Many contractors use the next week look ahead, or NWLA, in some form or fashion today. All of the

critical discussions addressed in the first four agenda steps should culminate in the best schedule possible that captures what the "brains of the organization" believe to be the best schedule. This schedule needs to capture order, priority, and notation about needed equipment, material deliveries, and communication with inspectors, client contacts, etc.

### VI. Final Q&A & One More Run Through

Certainly different members throughout this preconstruction meeting will ask questions. However, just before the team "breaks the huddle" it is important that a formal STOP and allowance for questions be provided. This one more time for a brief Q&A may still allow those who have been quiet up to now a final chance to speak. Once the last question is addressed it's a good idea to briefly run back through what we believe to be the right way to complete our scheduled production. Using the NWLA is easily the best tool to complete this final agenda step.

If your crews take won jobs and execute the estimated work flawlessly, then this article has been of little importance. However, if you are finding that your crews and estimators are not always on the same page, in fact, sometimes they are miles apart, and that jobs are coming in with even less profit than you had planned, then perhaps you need to implement a more aggressive and thorough pre-work discussion. This is most often addressed through a pre-construction meeting.

Remember the old saying...

If you fail to plan...you plan to fail!

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Brad is President of Pinnacle Development Group, a management-consulting firm specializing in the construction industry. For more information about Brad and his company go to [www.pinnacledg.com](http://www.pinnacledg.com). Also, join Brad's weekly column for contractors by going to [www.thecontractorsbestfriend.com](http://www.thecontractorsbestfriend.com).

