- **Systems** is the method of transforming a job-at-a-time tradesman to a business entity. A predictable path for information and activity adds consistency to a business.

- A commonly accepted flow of management information called the **management cycle** includes: Planning – Organizing – Directing – Controlling. This management cycle is fundamental to all systems.
The reason you have a company is?

To fulfill your goals..

- What are they?
- How does the company contribute to their fulfillment?
- How do you measure these?
The Management Cycle

- Strategic Plan
- GOALS
- Monitoring
- Execution
- Resources

Key:
- Green circle: Liability flashpoints
Mission Statement

- ZERO DEFECTS in workmanship
- Customer satisfaction with service
- Employee fulfillment
- Continuous lead generation through reputation and referrals
“The more you learn the more you earn”

Systems allow:
- Growth
- Tracking
- Measuring
- Accountability

flow of information back into the process
The first activity in running a business is

A. Planning
B. Organizing
C. Directing
D. Controlling
All Systems Start with a plan

- Your Contracing Co. Inc
  - Sales and Marketing Plan
  - Production
  - Annual Buget
  - Staffing Plan
  - Job Descriptions
  - Safety manual
  - Safety Training
  - Company Business Plan (multi-year)
    - Your personal Financial needs
      - Schedule for each job
      - Daily Job Logs

If graphed ~ What do your systems look like?
Systems / Competencies in Building & Remodeling

- Sales and Marketing
- Estimating
- Communications
- Production - Safety
- Financial Management
- Business Management
FORMS ANIMATE SYSTEMS

- Store information
- Move information within the system
- Hand off to others
- Enhance communication
- Create repetition
- Minimize omissions
Sales and Marketing

- Lead Generation
- Site Visit
- Estimate delivered
- Contracts
- Construction
- Billed work
- Customer data base
Sales and Marketing System

Lead Generation & Tracking

Qualifying Process

Customer Management

Sales & Marketing - Chapt. 3

- Budget
- Solicit
- Type of Habit
- Promotion

- Proposal
- Statement
- Return Contact
- Sales Contact

- Change Order
- Client/Contact Sheet

- Client/Contact Sheet
- Customer Survey
Estimating

- Create multiple uses for estimating
- Minimize risk to profit
- Have a repetitive process
- Measurable evaluation of your accuracy
- Track a timeline for turnaround from request to proposal delivered
Communication Systems

- Employees
  - Employee manual
  - Work orders
- Customers
  - Expectations
  - Schedule
  - Payments
  - Job site condition
- Subcontractors
Production Systems

- Lead carpenter
- Overall job schedule
- Work orders
- Daily job logs
- Change Orders
- Punch list
Safety Systems

- Designated safety agent
- Toolbox talks
- Accident reporting form
- Job classifications
- Workman's compensation system
- Site inspections
Financial Management

- Budgeting
- Tracking
- Reporting - Compliance
- Apply costs back to estimated expenses
- Are jobs profitable
- Which jobs are profitable
- Industry Standards
- Identify areas of improvement
Business Management

Business Planning vs. Annual Planning vs. Job Planning

Systems and tools to track your progress

External compliance: IRS, Insurance Audits, P & L,

Balance Sheet vs. P & L

Gaining efficiencies –

“Anything worth doing is worth measuring”  Shawn Draper, IMRE Communications
Additional Sources -

www.Score.org
www.SBA.gov

- Defensive Estimating – Protecting your Profits
  www.builderbooks.com

- Toolbox Safety Talks
  www.builderbooks.com

- Selected Construction Regulations for the Home Building Industry –
  http://www.osha.gov/

- THE PAPER TRAIL – SYSTEMS AND FORMS FOR A WELL RUN REMODELING COMPANY –
  Bill Asdal & Wendy Jordan
  www.builderbooks.com

Visio software-chart your systems
Thank You for attending!

Additional questions?

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