

The Paper Trail – Systems and Forms



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- **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 Management Cycle



Key
● Liability flashpoints

Mission Statement-

Asdal Builders Inc.

- ZERO DEFECTS in workmanship
- Customer satisfaction with service
- Employee fulfillment
- Continuous lead generation through reputation and referrals

The Learning Curve to Profitability

“the more you learn the more you earn”

Systems allow:

Growth

Tracking

Measuring

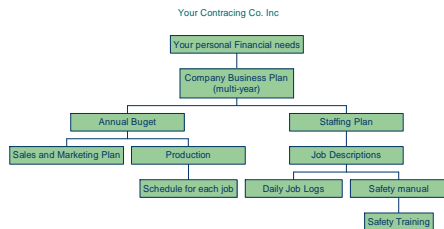
Accountability

flow of information back into the process

Question

- The first activity in running a business is
- A. **Planning**
- B. Organizing
- C. Directing
- D. Controlling

All Systems Start with a plan



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

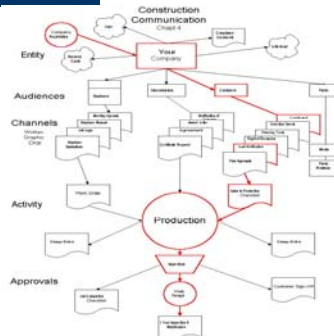


Estimating

- 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



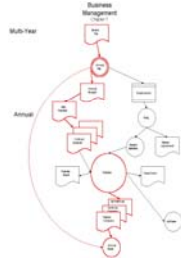
Safety Systems

- 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

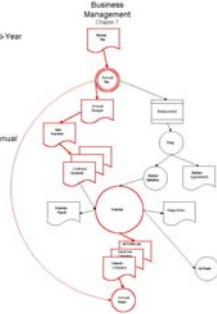
Systems and tools to track your
progress

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 -

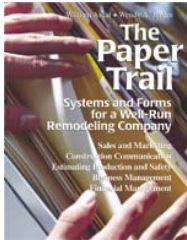
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FOR A WELL RUN REMODELING COMPANY –
Bill Asdal & Wendy Jordan
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*Visio software-
chart your systems*

Thank You for attending !

Additional questions ?



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