

ESTIMATING DEPARTMENT CHECKUP

Estimating labor is one of the largest overhead expenses in electrical contracting. Finding a competent warehouse supervisor is much easier than finding and keeping a highly skilled, seasoned electrical estimator. When you find a quality employee, your company should have a structure that will provide your estimator with an ideal working environment.

Most of us see our family doctor for an annual checkup. Why not give your estimating department a checkup? Take a few moments one morning before your busy day begins and examine how well they are doing.

DEPARTMENT ORGANIZATION

1. Do you have a weekly estimators' meeting?
2. Do you have a post project meeting?
3. Do you have an estimating drive on your server with an organized file structure?
4. Do you have a project estimate template folder on your server?
5. Do you provide structure for employees – what are your negotiables and non-negotiables?
6. Do you have a written estimating department procedural manual?
7. Do you have project estimate binders with organizational tabs?
8. Are you running the latest version of your estimating program?
9. Do your estimators have tech support with your estimating software?
10. Do you have a database manager for your estimating program?
11. Do you have a protocol for estimators to provide input estimating program database?
12. Do you have email policies for your estimators?

DEPARTMENTAL LEADERSHIP

1. Do you provide solutions and leadership or just try to lay blame at the feet of others?
2. Do you allow adequate time for an estimate to be properly done?
3. Do you procrastinate in assigning projects to estimators?
4. Are you a manager or a leader?
5. Do you inspect what your estimators are doing?
6. Do you provide in-house training opportunities for your estimators?
7. Do you provide onsite training from an expert consultant?
8. Do you provide online software training?
9. Do you reward quality work and extra effort produced by your estimators?
10. Do you have a post-project meeting to compare the actual work versus the estimate?
11. Do you have an annual review with each estimator to discuss victories, defeats, and compensation?

ESTIMATING

1. Do you require estimates to be completed a minimum of 24 hours before bid is due?
2. Do you have a master list of bid exclusions and qualifications?
3. Do you have large monitors and wireless keyboards on estimating tables for easy direct entry from the drawings?
4. Do your estimators maintain quotation files?
5. Do you use an electronic pricing service for current market pricing for your estimates?
6. Do you have an estimating sequence for your estimators to follow?
7. Do you track the production and success rate of your department and each estimator?
8. Do you provide a detailed project book of the successful estimate to your project manager?
9. Do you have a policy for dead estimates?
10. Do you have customized reports for estimators and project managers?
11. Do you have an estimate checklist?
12. Do you have a bid summary checklist?
13. Do you have a telephone quotation form?
14. Do you have a bid follow-up policy?
15. Do you have color codes for different conduit installations? – ie: exposed, slab, concealed, UG

Give yourself a score. There are thirty-eight check points, divide the number of yeses into thirty-eight and you will know your score in percentage.

Remember, estimating is expensive, poor estimating is costly, but quality estimating is profitable!

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