

WORKING SMARTER WITH Lead Carpenters

In a small remodeling company that has just one job going at a time, the owner can keep track of everything. But when the business grows and two or three projects are underway at once, the job of assigning personnel, coordinating subs, and ordering materials for multiple loca-

by Tim Faller

tions becomes more than one person can handle. The owner's time is soon consumed with running from job to job to make certain instructions are being followed, attending all site meetings, and overseeing every decision, no matter how small. Nights and weekends are spent meeting prospective customers and doing estimates; business becomes life, and there's little time left over for personal or family time.

If your typical workweek fits that description, introducing a lead carpenter system into your company could lessen your work load, increase your efficiency, and free up your time. Under this concept, projects are managed from the site by a lead carpenter who organizes the job, schedules and supervises the subs, orders materials, meets with the customer, and performs most of the carpentry work.

Lead Carpenter, Not Foreman

Traditionally, construction companies are organized around carpenters who rotate through a job according to their specialty — foundation forming, framing, finish trim, and so on. In each case, however, the carpenters rely on a foreman or production manager to coordinate the job. This person typically manages three or four jobs simultaneously and does no physical work; instead, he or she is charged with getting materials to the job site, assigning personnel to projects, scheduling subs, and other management tasks.

The lead carpenter system breaks with tradition, placing direct responsibility for job-site management with a working supervisor. For remodeling jobs that

Reduce overhead and increase efficiency with this job management system

exceed \$750,000, you may need a full-time, on-site manager; but for most smaller remodeling projects, the cost of having a foreman on site adds unnecessarily to the cost of the job.

I discovered the lead carpenter system when I closed my own contracting business in 1988 and went to work for Hopkins & Porter, a remodeling company in the Washington, D.C., area. I now work for them as a production manager, but rather than handling the daily operations of three or four projects, I oversee as many as ten lead carpenters, leaving daily responsibilities with them. This article lays out the basic principles of the lead carpenter system. Our company has been fine-tuning the system for 15 years, and — like us — you'll want to tailor the system to your company and personality.

Benefits

The lead carpenter concept introduces a new management style that has many advantages:

Better supervision. Jobs run more smoothly when a lead carpenter handles the day-to-day details. Even the smallest of remodeling projects involves a complex process — there are materials to order, subs to schedule, and helpers to supervise, as well as unforeseen interruptions and delays to work around and unexpected structural problems to investigate. Multiply this by three or four simultaneous jobs, and the number of decisions to be made and problems to

Lead Carpenter Certification

The National Association of the Remodeling Industry (NARI, 4900 Seminary Rd., Suite 320, Alexandria, VA 22311; 800/966-7601) has developed a certification program for lead carpenters. Applicants must first complete an application, or Qualification Matrix, to show that they have at least five years of continuous work in the remodeling industry, two of which must be as a lead carpenter. The application also includes questions about technical knowledge, community service,



and employment background. In addition, applicants must submit two letters of reference from their employer, a NARI Certified Remodeler (CR) or Certified Remodeler Specialist (CRS), or from past clients.

The second part of the certification process requires successful completion of a one-day written examination on a variety of subjects ranging from business management, construction law, and job-site safety to interior finishes, roofing and siding, and mechanical systems. The NARI Certification Board reviews the applicant's exam score and Qualification Matrix before granting certification.

NARI will provide a list of study materials for the exam and will assist applicants in starting or joining a local study group to prepare for the exam. Fees for application materials and the exam are \$285 for NARI members and \$400 for nonmembers. For annual recertification, CLCs must participate in continuing education and be active in remodeling-industry-related activities.

be solved can be overwhelming. A lead carpenter, however, can identify and correct problems as they arise, because he or she is on site every day, has a thorough knowledge of the plans, and has the authority to make decisions.

While I was still a lead carpenter, for example, I managed the construction of a two-story addition for a handicapped man who had to be able to move his wheelchair between the old and new building without facing any impediments. When I compared the prints with the actual conditions, I noticed there was a difference in elevations that would have created a problem at the transition where old and new flooring met. I adjusted the framing accordingly, and rechecked the elevations after the oak floor went down. The problem arose suddenly, but because I had the authority to make on-the-spot decisions, I was able to implement a solution without calling my boss to the site.

One man, one job. A lead carpenter concentrates on one job from start to finish. This puts one person on the site every day who understands every aspect of

the project, from budget to schedule to choice of finish materials. The lead carpenter isn't distracted, as a company owner would be, by worries about material orders for other jobs, whether it's the Smith or Jones job that needs the gold-plated faucets, or if there's a meeting scheduled across town for another job. Because the lead focuses on the details of one job, there is less chance that something will be forgotten.

I currently oversee multiple jobs as production manager, and it's impossible for me to know all the details of each. Typically, plumbers, electricians, and other subs who are anxious to get started will call me to check on a job's status. I immediately refer them to the lead, who is in a much better position to answer their questions than I am.

Homeowner access. With a lead carpenter on site every day, your customer has immediate access to a company decision-maker. This can save you, the company owner, a lot of unnecessary running around. It's not uncommon, for example, for the homeowner who arrives home after work to review the day's progress and find something that is not being done right. The call usually comes that evening or the next morning at 7:00 a.m. Because you haven't been to the site, you don't know if the complaint is valid, but you promise to come right over. Upon arriving, you find that the carpenter has followed the plan perfectly, but the final product simply didn't look the way the customer expected it to. You've wasted time, and the job has come to a halt while you review the work with the homeowner.

With decision-making authority delegated to the lead carpenter, the homeowner has direct access to the person doing the work and who is in a position to answer questions and speak on your behalf. You'll still have to be involved, but you can eliminate emergency trips and schedule your site visits instead. As production manager at Hopkins & Porter, I meet every two weeks with the homeowner to review job progress and answer homeowner concerns. All communications between meetings, however, go through the lead carpenter.

Motivated employees. When you give lead carpenters decision-making responsibilities, you demonstrate a trust in their judgment that will motivate them to take on more duties. We discovered this benefit at one of our company's monthly staff meetings during a slow period several years ago, when pay raises were out of the question. We were discussing changes in our lead carpenter system, which at the time called for all material orders and sub scheduling to be handled from the office. Our leads realized this arrangement was inefficient, and they volunteered to handle these additional responsibilities themselves. Even though they hadn't been

offered more money, they left the meeting feeling they were important to the company.

Free time. Company owners can free up their time by delegating responsibility to the lead carpenter. This allows extra time for business planning; selling and estimating jobs during the day, rather than at night; enjoying more time with your family; or taking a vacation. Conversely, some owners may decide to stay in the field as a lead carpenter and delegate selling and estimating to others. In either case, the company owner has time to pursue other activities, both personal and business-related.

Increased profits. The lead carpenter system improves a company's bottom line, because the lead combines supervision with production. This cuts overhead costs by reducing the number of production managers (see Figure 1). With a traditional construction management scheme, for example, ten jobs would be overseen by three production managers; under the lead carpenter system, the number of production managers can be reduced to one, thereby eliminating two salaried positions.

Recently, a remodeler told me that after implementing the lead carpenter system his profits grew by 15% as a result of the increased efficiency. While you may not achieve the same results, this example shows the potential of this management system.

Drawbacks

The lead carpenter system has some disadvantages, however. For instance, the constant contact between homeowner and lead may develop into a close personal relationship that may cause the lead to forget his allegiance to the company. This could cause the lead to spend too much time on small details or to overlook billable extra work.

Another problem arises when the lead carpenter isn't ready for the added responsibility. He or she quickly becomes overwhelmed, and the efficiencies of the concept are lost.

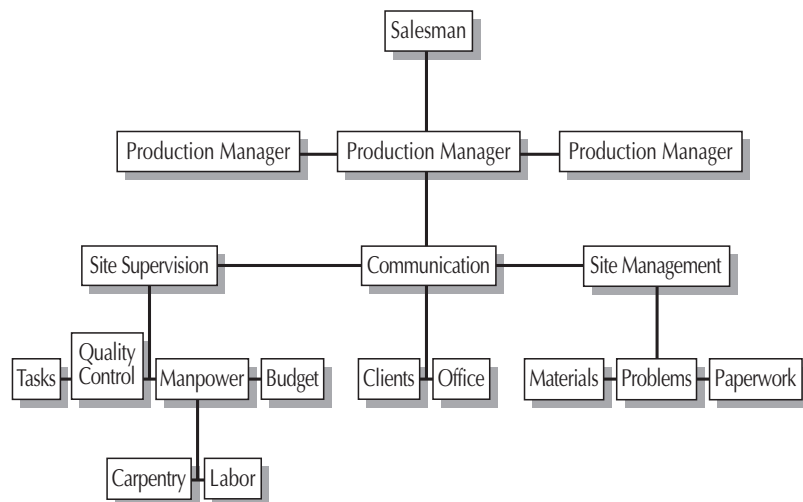
The same inefficiency occurs if the company owner is not ready to let go of responsibility. Owners who hover over the lead, second-guessing every decision, breed frustration and distrust. This defeats the purpose of the lead carpenter system and sometimes encourages the customer to insist upon talking only with "the boss."

Finally, because the lead carpenter system introduces another person into your company's decision-making process, the chance for miscommunication increases.

The Ideal Lead

It's critical, then, that you find the right candidate for lead carpenter, and that you provide him or her

Traditional Construction Management



Lead Carpenter Management

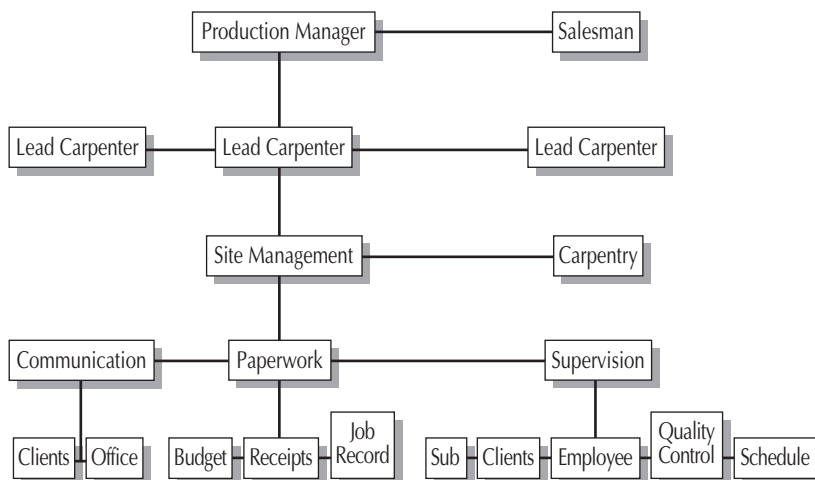


Figure 1. In traditional construction management (top), the salesman hands off the job to one of several production managers, who coordinates all aspects of the job — labor, materials, schedules, subs, and customer relations — and who typically oversees three or four jobs simultaneously. With the lead carpenter system (above), a single production manager oversees several lead carpenters, each of whom works just one job from start to finish and handles all aspects of project management.

with proper training and support. Finding tradesmen to fill a lead carpenter position who are naturals for the job may be difficult (Figure 2). Some candidates will be good craftsmen but won't understand management; others will be great managers but may lack building expertise. You'll find people who have the potential to strengthen their skills, but you'll have to make a commitment to assist them in developing

Lead Carpenter Job Description

The Lead Carpenter is the company's on-site construction manager. Lead carpenters are responsible for carrying out the job from start to finish, for coordinating subs, keeping within budget, completing paperwork and job reports, timely code inspections, and representing the company on the job site.

Carpentry: Perform all carpentry work; request help as needed; assign and supervise other carpenters and helpers, including verification of time cards.

Develop and Maintain Project Schedule: Create project flow chart; monitor progress against chart; notify Project Manager and office of schedule problems.

Paperwork: Know and understand all job paperwork, including plans, specifications, and change orders; maintain all job records as required by office.

Material Takeoffs: Prepare final material takeoffs; order materials promptly and accurately; accept and reject materials; confirm quantities shipped (specialty items are ordered by Project Manager).

Schedule and Coordinate Subcontractors: Ensure timely code inspections; confirm proper installation of materials, fixtures, etc.; ensure that subs adhere to company policies regarding safety, cleanliness, alcohol use, and customer relations; approve subcontractor payment.

Change Orders: Carry out change orders prepared by Project Manager or Salesperson; complete no extra work without their authorization.

Job Safety: Promote safe job-site conditions; monitor company and individual equipment for proper safety features, safe electrical cords, etc.

Maintain Clean Work Site: Install dust protection; control mud; contain debris and haul away promptly; leave job broom-clean at day's end.

Protect Client's Property: Enforce hands-off policy of client's belongings; secure and lock job site before leaving for day; store materials in safe place.

Customer Relations: Represent company in its dealings with customers; enforce policy of no loud radios or foul and abusive language.

Job Sign: Install job sign in prominent location.

Figure 2. A lead carpenter takes on responsibilities beyond those routinely assigned to production carpenters, including scheduling, sub supervision, material orders, change order preparation, and homeowner interaction.

these talents.

You may find a lead carpenter among your current employees, or you may have to recruit from outside. When you promote from within your company, you have the benefit of placing someone in the lead carpenter position who is familiar with your company's personnel and systems; someone from outside your company may provide new skills that will benefit your company. In most situations, however, promoting from within is a better choice, because you will be familiar with a candidate's work habits.

Here are some qualifications you should look for when hiring a lead carpenter:

Good carpentry skills. Look for a well-rounded tradesperson, not necessarily someone who can cut a perfect miter every time. A lead carpenter will need a

solid understanding of the work of subtrades, in order to pass judgment on whether the sub's work is properly installed. Also, a lead will need to understand the normal sequence of remodeling jobs — what trades are scheduled when, how many trips may be necessary for a plumber or an electrician, and so on.

Optimistic attitude. Remodeling work is challenging, and a good lead carpenter must be able to roll with the punches. A lead should have a can-do attitude and should not become frustrated easily.

Good people skills. Many different types of personalities come together on a remodeling job, so you'll want someone who gets along well with different types of people. A lead carpenter should be able to handle difficult homeowners, motivate reluctant employees, and calmly deal with building inspectors who complain that something doesn't meet code and must be done over. Ideally, you'll want a lead carpenter who can establish standards and motivate the team to accomplish them.

Good communication skills. Closely linked with good people skills is the ability to express ideas clearly. Your lead should be someone who looks you in the eye when speaking, who lets you finish your sentences, and who has a good technical vocabulary. You'll want a good listener, not someone who monopolizes the conversation.

Team player. The lead carpenter must understand that many people contribute to the success of a project — not just the crew in the field, but office staff too. He or she must understand how the various departments of your company are connected and the reasons behind established procedures.

The successful lead will have a mix of technical and people skills. A lead may be stronger in one area than another, but you should look for a balance. When evaluating a candidate, try to determine whether his or her weaknesses can be strengthened through on-the-job or outside training. Also decide on the degree of commitment you are willing to make to bring this person up to speed.

Finding a Lead Carpenter

The easiest route is to evaluate current employees for performance and suitability as lead carpenters. With a new hire, the challenge is greater and you'll want to be careful in your selection. People with the qualities you are looking for are difficult but not impossible to find. Some of the strongest candidates are business owners who want to give up running their own company, but who want to stay in the construction industry in a position of responsibility.

Hopkins & Porter has had its greatest success recruiting carpenter helpers with the intention of turning them into lead carpenters. Of the helpers we

hire, three-quarters develop the skills necessary to move into a lead carpenter position; half of our new hires choose to stay with us, in part because of the advancement opportunities we offer. Along the way, we do annual performance reviews, monitor their job-site behavior, evaluate their communication skills, and get feedback on their supervisory ability from subs. We also pay attention to how quickly they learn our procedures.

Implementation

A good plan is crucial to the successful transfer of management responsibilities from office to field. I was fortunate enough to join a company that had a lead carpenter system in place, but your company can introduce the system by following these guidelines:

Plan ahead. The lead carpenter system is a model, not a monolith. Your company is unique and your plan will need to take into account how your business is organized, the personalities involved, what responsibilities you want to transfer, how coworkers will be affected, and what outside resources are available to implement the system. Also, design a contingency plan, in case the lead carpenter idea doesn't work for you. In developing your plan, include everyone who will be involved in the transition.

Part of the process will include designing a schedule for phasing in the plan. If you load lots of additional responsibilities onto your new leads, they'll burn out quickly. Instead, ease into the situation by gradually increasing the leads' responsibilities. For example, start them off with responsibility for scheduling subs, then add the job of ordering materials; later, add responsibility for approving payments to subs. Allow one or two years to make the transition, and use that time to give the new leads weekly feedback on their progress and provide training to strengthen their weak points.

Solicit input from companies that already employ lead carpenters. Conferences and local trade associations are the best resources for networking. You'll learn how others have tweaked the concept to fit their way of doing business. Also, look into the lead carpenter certification program offered by the National Association of the Remodeling Industry (see "Lead Carpenter Certification"). Individuals interested in becoming a Certified Lead Carpenter (CLC) must complete NARI's background questionnaire and submit letters of reference prior to taking an all-day exam, which tests technical skills and aptitude for project management and customer service.

Training. Without good training, a fledgling lead carpenter system will collapse. As a business owner, you can provide on-the-job training, showing the lead your preferred way of completing procedures,

such as how to handle job-site meetings with customers, how to complete change orders, and your way of managing subs. Holding monthly meetings with an assigned topic is another way to introduce new information and promote interaction between field and office staff. Veteran lead carpenters can facilitate these meetings, which should take place during the day with all participants paid for attending.

Take care of business. Most carpenters are good craftspeople, but they have given little thought to the business end of your company. Lead carpenters will have to learn unfamiliar business concepts, like markup, overhead, and profit, and will need to understand how these affect the company's bottom line. You'll need to spend time showing new lead carpenters how to calculate a change order, or explaining why you charge \$25 per hour for employees who are paid only \$15. And you'll have to convince new leads that all that extra paperwork is necessary.

The hardest part is training leads to think as you do. You'll need to explain, for example, how one carpenter on a job can be more productive than two or three, or what effect regular safety training has on the bottom line, or why sending the best trim carpenter to the lumberyard to pick up a pound of nails is not a wise management decision.

In some ways, lead carpenters will be running mini-businesses, but you'll need to stay involved so that both "businesses" prosper. Include leads in preconstruction meetings, monitor progress weekly, make yourself available to answer questions and lend guidance, and ensure that leads get timely information. Provide leads with job-cost reports (biweekly, at a minimum), and show them how to interpret the reports. Finally, visit the job site regularly, and be sure to compliment the lead on a job done well or offer constructive criticism when he or she doesn't meet your expectations.

The lead carpenter concept not only positions your company for greater efficiency, it also presents an opportunity to review your current systems and make improvements. One of the great benefits of the lead carpenter concept is that there is no definitive "one size fits all." How you adapt the idea to your business will depend upon your personality and those of your employees, as well as your business structure. Properly implemented, the lead carpenter system can work regardless of whether you're a two-person company looking to expand or a big remodeler looking to work more efficiently.



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