

Computer Proposals Make For a Good First Impression

by Scott Shelley

Contractors joke about giving an estimate on a napkin, but it's no laughing matter when I see a potential client comparing my proposal to something scribbled on a piece of notebook paper. The way we present our proposals for the work to be completed is one of the few opportunities to make a good impression — why waste it?

Clients often tell me that even though I was more expensive than my competition, they hired me because of the care I took to present my proposal to them. They see my neat, well-organized, professional presentation as rep-

resentative of how I run the rest of my business, and they assume the same amount of effort will be put into the actual work on their project.

I use my computer and the local copy center (such as Kinko's or Mail Boxes, Etc.) to produce spiral-bound proposals that look consistent from one job to another. I use the best paper and covers available to convey quality. The \$15 spent on four or five copies for each job is probably the best money I spend all year for marketing.

The Cover

In my word processing program I have a document named "estcover" (see Figure 1). I created this document years ago and have updated the appearance

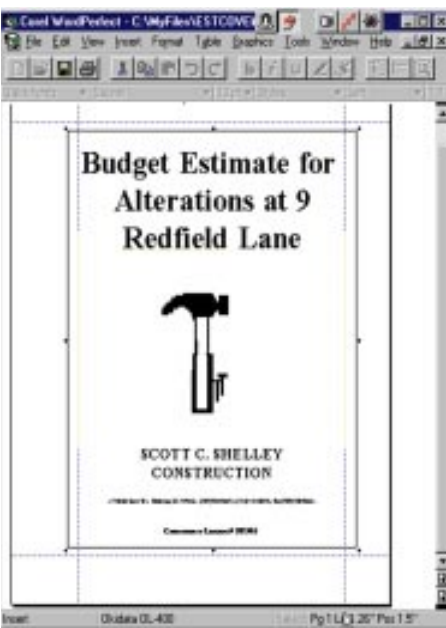
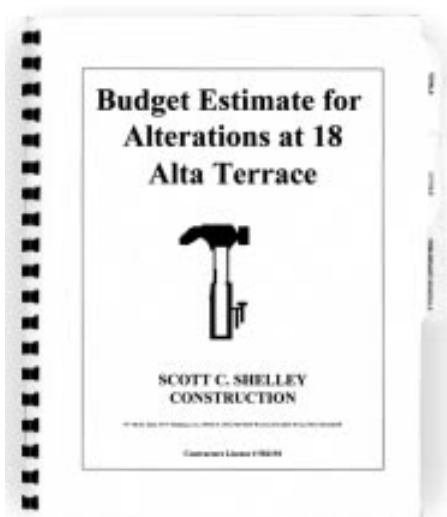


Figure 1. The author created this template, named "estcover," on a word processor. For each new proposal, he adds specific client and job information, then saves the file under the client's name. The original template remains unchanged and can be reused for future proposals.



Using documents prepared on a computer, a copy shop can prepare a bound proposal, complete with tabbed dividers and high-quality paper, for \$3 to \$5 per copy.

slightly over time. This cover page shows my logo and all of my company information. Every time I need to create a proposal, I add the specific job information, such as the client's name and address, then save the file to a different file name. I print out the finished version and set it aside.

The Body

The body of my proposal consists of a printed estimate, notes of explanation, a complete schedule, and any other relevant documents, such as detail sketches. I start the proposal body in the estimating program or spreadsheet in which I performed the original estimate for the job. At this point I decide exactly how much information I want to show my potential client. Some people I feel very comfortable sharing lots of detail about costs and quantities with; other "tougher" clients may be better served with just an overview of the job. If I used a simple spreadsheet for the estimate, I may hide the rows or columns I don't want the client to see. If the estimate was generated in an estimating program such as WinEst, I'll pick a report style that conveys what I want to show (Figure 2). When I'm satisfied the information is appropriate for the particular client, I print the report, which will usually be one to five pages long.

Clearing Up Details

Estimates by themselves are often confusing for a client, so I use my word processor to put together a list of notes or descriptions about specific items that may need explanation (Figure 3).

Computer Bytes

Windows 98 Glitches

A routine installation of Win98 can overwrite newer drivers and other shared files used by scanners and other devices, rendering them unusable. According to Microsoft, the substitution is necessary to "be assured of a known, working baseline operating system" after the installation.

Luckily, Win98 also provides a utility called the "Version Conflict Manager" (VCM), but it's hard to find. To get there, click Start | Programs | Accessories | System Tools | System Information | Tools | Version Conflict Manager. VCM reports changes in any shared files and gives you a chance to reload the originals.

Even better, you can find out if any of your devices or programs needs one of the changed files by downloading the Barry Press Utilities, available from www.aros.net/~press.

Auto-Recalc Patch for Excel97

A patch is available to repair issues related to shared formulas in Excel97. If you're not sure whether or not you need the patch, download and apply it — the installer will stop you if you're current. The patch can be downloaded at <http://officeupdate.microsoft.com>.

The Need for Speed

Intel will announce its mobile Pentium II 300 processor on Sept. 8; IBM, Gateway, and other vendors are planning Pentium II 300 notebook releases soon thereafter. The new chip promises better heat and power handling than the current PII266, and should send prices on slower models tumbling. Expect perfectly capable notebooks to be available by Christmas for less than \$1,000.

Access Stings Data

Microsoft has confirmed a bug in Access 97 which can damage records by overwriting a good record with an edit made in another. Microsoft has posted a temporary fix at www.microsoft.com while it ponders a more permanent solution. Users report Access 2.0 and 95 may also be affected.

CSI	Item Description	Takeoff Qty	Unit	Labor \$/Unit	Mat \$/Unit	Subs \$/Unit	Equip \$/Unit	Other \$/Unit	User \$/Unit	Total \$/Unit	Grand Total
1	1020 Allowance for Island/Install	3000	Item		1.00					1.00	3000
2	1020 Allowance for Built in/Install	2500	Item		1.00					1.00	2500
3	1020 Allowance for Cornice/Install	2000	Item		1.00					1.00	2000
4	1480 Supervision	3000	Item					1.00		1.00	3000
5	1500 Temporary Wall	300	Item		1.00					1.00	300
6	1800 Maintenance	1500	Item					1.00		1.00	1500
7	2095 Concrete Sawing	200	Item			2.00				2.00	400
8	2062 Remove Masonry Block 4" E	360	sqft	2.67	0.97			0.89		4.53	1630
9	2062 Remove Plaster & Lath/Wool	640	sqft	1.09						1.09	697
10	2075 Move Demolition Debris - Ha	10	cuyp	48.00						48.00	480
11	2075 Move Demolition Debris - Ha	40	cuyp	25.50						25.50	1020
12	2075 Move Demolition Debris - Ha	30	cuyp	25.50						25.50	765
13	2075 Haul Demolition Debris - 10 c	10	cuyp			18.00				18.00	180
14	2075 Haul Demolition Debris - 40 c	10	cuyp			22.00				22.00	220
15	2075 Haul Demolition Debris - 40 c	40	cuyp			19.75				10.75	430
16	2212 Compaction in 6" layers - har	3	cuyp	11.54						11.54	30
17	2220 Excavate Misc by Hand	5	cuyp	74.48						74.48	360
18	2220 Excavate Footing - Hand Tar	24	sqft	0.45			0.11			0.56	14
19	3120 Layout Grade Beams	4	hour	30.00						30.00	120
20	3120 Grade Beam Forms 3/4" Ply	90	sqca	5.33	1.68		0.14			7.16	644
21	3120 Strip Grade Beam Forms	80	sqca	0.45						0.45	41
22	3211 Footing Rebar #5 Grade 60	0	ton	3600.00	4500.00					8100.00	540
23	3219 Dowels #5 2L	32	each	4.05	3.55					7.60	243
24	3312 Grade Beam Concrete 3000	2	cuyp		157.50					157.50	350
25	3312 Place Grade Beam Concrete	2	cuyp	40.50		72.00				112.50	250
26	5050 Steel ASTM 307 Bolts 5/8"	32	each	11.25	3.00					14.25	456
27	5100 Structural Metal Framing	(590)	Item			1.00				1.00	590

Figure 2. The author includes a WinEst report in his proposal. Since not all potential clients want or need to see all of the estimate detail, the report can be customized by using different report styles or by turning off specific rows and columns.

For example, if I have had to make assumptions about level of finish or other details because of lack of information on the plans, I will include a note about those items. This extra step goes a long way toward communicating clearly and avoiding misunderstandings about what is and is not included in the proposal.

Sharing the Schedule

Two of the greatest anxiety producers for people considering a construc-

tion or remodeling project are not knowing how long it will take, and not knowing what to expect from day to day. The best schedule in the world has no value if you don't share it, and I've found that this part of the proposal really helps to make the potential client feel as though I have been doing my homework. They can also use the schedule when talking with the bank or with other subcontractors, such as landscapers or decorators, who they may hire separately to come in after

Notes About Specific Aspects of the Proposal

GENERAL REQUIREMENTS: The cost of mobilization, supervision, temporary facilities, equipment rental, daily clean up, sanitary clean up, final cost, profit and other general cost. Permits and Fees are not included and are to be paid by others.

SITE WORK: The cost for excavation, site work and drilling.

CONCRETE: The cost of formwork, forms, steel, finishing, clean, concrete and shipping and cleaning. Any flat work not specifically referred to in the plans and specifications is excluded.

METALS: The cost for Structural Steel, excluding the cost of inspection. Any inspection cost are to be paid by others.

CARPENTRY: The cost of carpentry labor and materials as specified.

MOISTURE PROTECTION: The cost of insulation, roofing, deck membranes and flashing.

DOORS AND WINDOWS: The cost for doors as specified, including the custom doors at the deck this door is to be provided by others. Trim will be supplied and installed according to the construction specifications. \$150.00 allowed for hardware. Minor and Stove/door installation are included in this category.

MAJOR WINDOW ALLOWANCE: Since there are many possibilities in approaching the subject and if our intention to provide you with exactly what you need, an allowance is provided for this category.

Figure 3. Notes about specific aspects of the proposal, such as the information on windows and doors shown here, head off questions and help prevent misunderstandings.

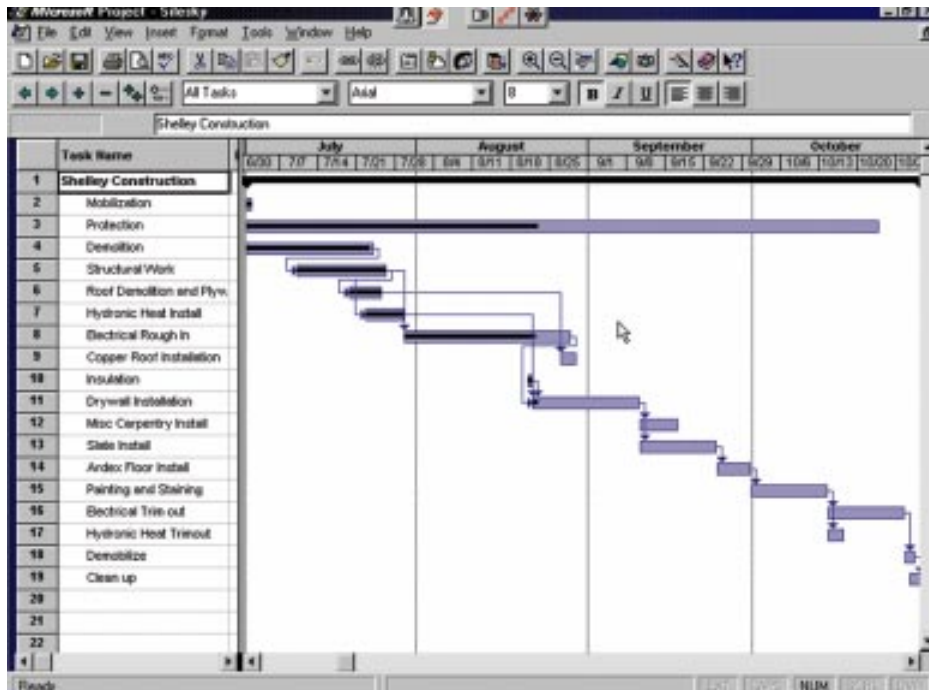


Figure 4. Including a project schedule in the proposal is one of most important factors in gaining client confidence. Any program that can generate a time line or Gantt chart will work.

my work is done.

I use Microsoft Project to create the schedule (Figure 4), but even a much simpler program like QuickGantt (see *Computer Solutions*, 9/98), which enables you to draw up a time line for the job, will impress potential clients. As with the estimate, I may also include notes to explain parts of the schedule, particularly if I anticipate a long delay somewhere in the middle of the job or if I've guessed at delivery lead times on items such as kitchen cabinets.

Putting It All Together

After I have all of the information printed out and ready to go, I use Post-It notes to mark the beginning of each section. When I take all of this information to the copy center, I ask them to insert tabbed dividers with labels to identify each section. This extra step makes it easy for my potential clients to sort through the proposal and find the information most important to them.

The beauty of using my computer to create the proposal package is the time it saves. By having my programs and document templates ready to go, the whole process of producing a proposal package

takes about an hour, including the time to run to the copy center.

The Benefits

I know from experience that using my computer as a tool to create proposals has helped my business grow. Clients have hired me solely on the strength of the proposal package, but a professional-looking proposal often gives my company an edge in a tight bidding situation as well. All things being equal, the client sees the professional proposal as the tie-breaker.

I've also used my proposals to build relationships with architects and designers. Even if I don't get the job, I send a copy of every proposal to the architect or designer of the project. Many of these design professionals are looking for a contractor to work with on future projects, and they like the fact that I can present the information in a clear and concise way. Some have even paid me as a consultant to prepare "budget estimates" for projects in the initial stages of design.



Scott Shelley owns Scott C. Shelley Construction, a remodeling company in Petaluma, Calif.