

SPECTRUM™

CONSTRUCTION SOFTWARE

10 Critical Processes



1

Change Orders: Make sure you are getting all the revenue you deserve!

5

Invoice Routing: Cut overhead costs, and improve accuracy of costing.

9

Business Planning: With accurate financial and job cost data create realistic plans.

2

Billing: Improve your cash flow – avoid missed change order billings.

6

Indirect Costs: Know the true cost of your labor and equipment.

10

Feedback: Create feedback mechanisms to automatically keep business on track.

3

Budgeting: Job costing is almost useless without an accurate baseline.

7

Projections: You can not have accurate financials without accurate projections!

4

Committed Costs: Know what you have already purchased and what cash is going out.

8

Detailed Financials: Know how much every part of your company is making (or losing).



ROAD MAP FOR INTEGRATING OPERATIONS AND ACCOUNTING WITH SPECTRUM™

**Executive Seminar Series:
Keeping Your Project on Schedule with
Spectrum™ Construction Software.**

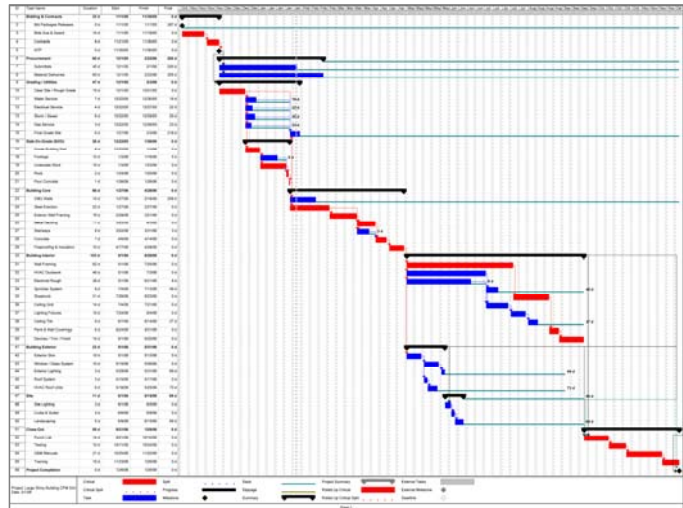
DEXTER + CHANEY

Information. Now.

“Execution is a systematic process of rigorously discussing hows and whats, tenaciously following through, and ensuring accountability.” — Larry Bossidy & Ram Charan / Execution: The Discipline of Getting Things Done

All projects start with a schedule – or at least some basic milestone dates.

This is the simple, “high-level” strategic part. Keeping the project on that schedule, hitting each and every milestone is the hard part. It involves the systematic use of weekly and daily processes that we will explore in detail.





SPECTRUM™
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Keeping your Projects on Schedule with Spectrum™ Construction Software Table of Contents

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Keeping your project on schedule with Spectrum™ Construction Software

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The System Overview

The overall system for keeping a project on track is very, very simple.

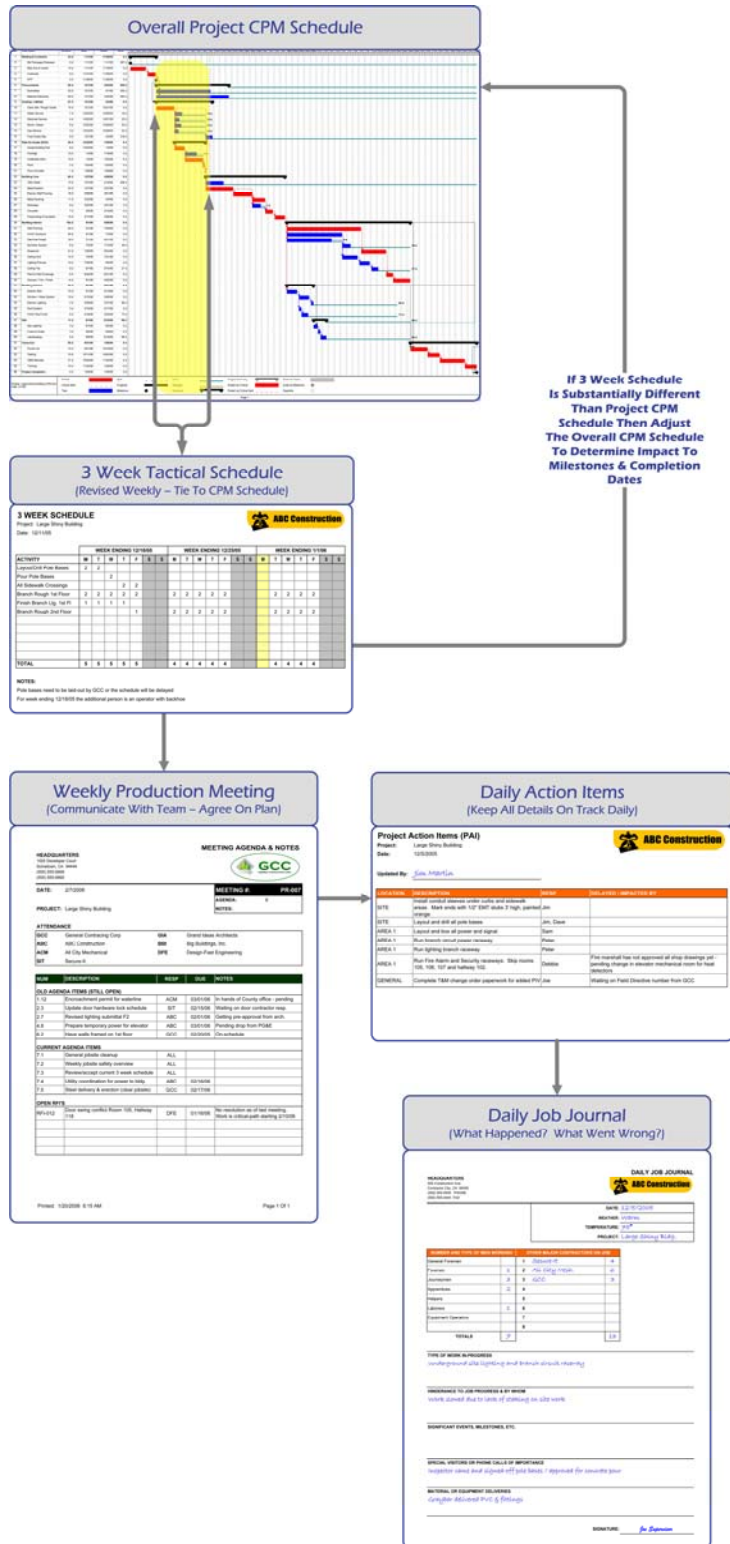
It involves two *weekly* activities followed by two *daily* activities. The flowchart shows the relationship between these activities and the overall project schedule.

For the purposes of this training module, we are not going to focus on the creation of the overall project CPM schedule. There are thousands of detailed training courses focused on the creation of CPM schedules with hundreds, or even thousands, of little colored bars all linked together. These schedules provide a framework, but do not guarantee completion.

Our focus is going to be much more tactical. It will be about the grinding details that separate the best performers from the rest.

What we are going to describe is a systematic approach that all the best performers use naturally in one form or another.

By turning this into a system, it can be structured, trained, and monitored. This will serve to slightly enhance the performance of your best players, while significantly improving the performance of your new and growing team members.





Why Do So Many Projects Get Off-Track?

If the process is so simple, then why do so many projects run into problems? Primarily it is because there is a big focus in schools and training on general scheduling or at the business level, what is called “strategy.”

Businesses and projects would be far better off if there were years spent teaching the discipline that J.P. Morgan paid \$25,000 for...

A man approached JP Morgan, held up an envelope, and said, “Sir, in my hand I hold a **GUARANTEED FORMULA FOR SUCCESS**, which I will gladly sell you for \$25,000.”

“Sir,” JP Morgan replied, “I do not know what is in the envelope, however if you show me, and I like it, I give you my word as a gentleman that I will pay you what you ask.”

The man agreed to the terms, and handed over the envelope. JP Morgan opened it, and extracted a single sheet of paper. He gave it one look, a mere glance, then handed the piece of paper back to the gent.

And paid him the agreed-upon \$25,000 ...

- 1. Every morning, write a list of the things that need to be done that day.***
- 2. Do them!***

Source: Hugh MacLeod/tompeters.com/NPR

If success is that simple, then why aren't more people good at it? To put it simply

SUCCESS is 95% BORING DETAILS!

It would be very hard to have a college class charging large fees to teach you how to manage the details. It is far flashier to make a course, give a speech, or write a book about big picture, strategic issues. Don't fall into that trap. Pay attention to the details and I guarantee you will improve the performance of your projects.

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The Process of Communication, Feedback and Detail Management

| | PLAN | COMMUNICATE | FOLLOW-UP | DOCUMENT |
|---------|---|--|---|---|
| MONTHLY | CPM Schedule Creation CPM Schedule Update (If Changes) | Review CPM Schedule During Project Kick-Off Meeting And Transmit Updates To All Parties | | |
| WEEKLY | ★ Build 3-Week Look Ahead Schedule Based On CPM Schedule With Details | Have Weekly Production Meeting With Project Team Laying Out New 3-Week Schedule | Review Prior 3-Week Schedule To See Who Did or Did Not Do What | Meeting Minutes Documenting Who Agreed To What, Missed Deadlines, Problems, Opportunities |
| DAILY | ★ Daily To-Do List With Minute Level Details Leaving Nothing To Chance Based On 3-Week Schedule | ★ Distribute List To Everyone Then Walk Around All Day Following Up On EVERY Detail, Making New List | Get Lists Back From ALL Team Members With Individual Notes About What Did or Did Not Get Done and Why | Daily Job Journal Documenting What Did or Did Not Happen Daily |

★ SUPER IMPORTANT!

- CPM Schedule:** The Critical Path Method (CPM) schedule or general project milestones are where the entire process begins.
- 3-Week Schedule:** Taking a look at the activities and milestones shown on the CPM schedule over a three week period, you should break these activities down into details, making note of specific responsibilities, manpower needs, and other details.
- Weekly Production Meeting:** Meet with the entire project team to review the 3-Week schedule, make any adjustments, and get everyone to agree to deliverables.
- Walk The Job:** Every day walk the job with a notepad making notes of every little detail you can think of that is needed to meet or beat the 3-week schedule.
- Project Action Item List:** Consolidate your scribbled notes into one detailed list with responsibilities and a notes column. From this make material lists, equipment lists, make installation detail drawings that are missing, etc. Distribute this list and information to everyone on the project. Get their feedback on the list daily.
- Daily Job Journal:** Summarize the key things that got done and, more importantly, those that did not, why they did not, what impacted you, how you will get back on track, etc.
- Start Over:** This is where the process usually breaks down. Everyone can get off to a good start, but then the challenges of the project seem to take over and one day gets



missed, then two, then a 3-week schedule is not updated, then the project gets off track. It starts with missing one day – **DO NOT MISS A DAY – EVER!**

The CPM Project Schedule

The details of creating a project schedule using the Critical Path Method is beyond the scope of this training. There is another training module that is part of this series called Schedule Management with more details on creating and updating the CPM schedule. In addition, there are dozens of books you can buy and classes you can take that are all related to building a schedule.

What is important to know is how to read through the schedule and pick out activities that are critical for your work.

Activities shown with red bars fall on the “Critical Path” for the project they need to be started and finished on time, or else the project completion will be delayed.

It is also important to look at the project schedule and pull out start dates for all activities that require long lead-time materials or equipment. With the start dates, work your way backwards adding in submittal time, lead (fabrication) time, shipping time, and staging time. Make sure you manage the heck out of this list.

Make sure there is enough “slack” in your delivery schedule just in case something shows up damaged or incorrect. Being able to place blame on a subcontractor or vendor will not recover all the costs associated with delaying the project.

The 3-Week Schedule

Once construction on the project starts, there are literally thousands of little changes that the Superintendent manages each and every week. These little changes are not reflected on the overall project schedule unless it becomes apparent that there is a significant difference between what the schedule says and what is actually happening in the field.

The 3-Week schedule is a planning tool the Foreman or Superintendent uses on-site to plan out the details of the next few weeks worth of work in more detail than the project schedule, including manpower levels, work area details, and even task-specific information.

The 3-Week schedule is a key part of the discussions during the weekly production meetings and is designed to be simple for everyone on the project to understand clearly what needs to be done in the next few weeks – e.g. the plumbing contractor knows that he will need two plumbers on-site starting Tuesday to work on the upstairs master bathroom.

What Is Good / Bad About This 3-Week Schedule?

| 3 WEEK SCHEDULE | | WEEK ENDING 12/18/05 | | | | | | | WEEK ENDING 12/25/05 | | | | | | | WEEK ENDING 1/1/06 | | | | | | |
|---------------------------|----------|----------------------|----------|----------|----------|---|---|----------|----------------------|----------|----------|----------|---|---|---|--------------------|----------|----------|----------|----------|---|---|
| | | M | T | W | T | F | S | S | M | T | W | T | F | S | S | M | T | W | T | F | S | S |
| ACTIVITY | | | | | | | | | | | | | | | | | | | | | | |
| Layout/Drill Pole Bases | 2 | 2 | | | | | | | | | | | | | | | | | | | | |
| Pour Pole Bases | | | 2 | | | | | | | | | | | | | | | | | | | |
| All Sidewalk Crossings | | | | 2 | 2 | | | | | | | | | | | | | | | | | |
| Branch Rough 1st Floor | 2 | 2 | 2 | 2 | 2 | | | 2 | 2 | 2 | 2 | 2 | | | | | 2 | 2 | 2 | 2 | | |
| Finish Branch Ltg. 1st Fl | 1 | 1 | 1 | 1 | | | | | | | | | | | | | | | | | | |
| Branch Rough 2nd Floor | | | | | 1 | | | 2 | 2 | 2 | 2 | 2 | | | | | 2 | 2 | 2 | 2 | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | |
| TOTAL | 5 | 5 | 5 | 5 | 5 | | | 4 | 4 | 4 | 4 | 4 | | | | | 4 | 4 | 4 | 4 | | |

NOTES:
 Pole bases need to be laid-out by GCC or the schedule will be delayed
 For week ending 12/18/05 the additional person is an operator with backhoe

- Details:** Each activity from the project CPM schedule should be broken down into smaller activities.



- The schedule above is good for showing some of those details, such as “Sidewalk Crossings,” but is poor because of the generalities around “Branch Rough 1st Floor.” This activity should have been broken down into smaller details, no more than about 160 man hours in length, so it can be managed.
 - Smaller chunks are easier to manage. It is easy to tell if you are 50% complete with a four day task. It is much harder to tell if you are 50% complete with a five week task.
 - Think about breaking larger activities down into geographic areas on the project.
- Responsibilities:** The schedule above is good, but it is also lacking in a responsibilities column. It is important to be clear in who is responsible for completing the task. That is how you will drive accountability.
- Manpower:** Make note of how many people should be assigned to each task. This is important to see if it is realistic. You will not be able to go from a six person crew to a sixteen person crew to meet the CPM schedule. It is in the process of putting the manpower details down that you will really see if there is “truth” in the CPM schedule.




The Weekly Production Meeting

The Weekly Production Meeting is the most important communication tool the Foreman, Superintendent, and Project Manager can use to keep the project on track and to make sure everyone is notified of changes.

This is the communication part of the process. It is also important to keep track of the notes from those meetings. These, along with the Daily Job Journals, provide a large part of the historical record on the project.

MEETING AGENDA & NOTES

HEADQUARTERS
 1025 Developer Court
 Sometown, CA 94444
 (555) 555-9999
 (555) 555-9990



DATE: 2/7/2006

PROJECT: Large Shiny Building

MEETING #: PR-007

AGENDA: X

NOTES:

ATTENDANCE

| | | | |
|------------|--------------------------|------------|-------------------------|
| GCC | General Contracting Corp | GIA | Grand Ideas Architects |
| ABC | ABC Construction | BBI | Big Buildings, Inc. |
| ACM | All City Mechanical | DFE | Design-Fast Engineering |
| SIT | Secure-It | | |

| NUM | DESCRIPTION | RESP | DUE | NOTES |
|--------------------------------------|---|------|----------|--|
| OLD AGENDA ITEMS (STILL OPEN) | | | | |
| 1.12 | Encroachment permit for waterline | ACM | 03/01/06 | In hands of County office - pending |
| 2.3 | Update door hardware lock schedule | SIT | 02/15/06 | Waiting on door contractor resp. |
| 2.7 | Revised lighting submittal F2 | ABC | 02/01/06 | Getting pre-approval from arch. |
| 4.8 | Prepare temporary power for elevator | ABC | 03/01/06 | Pending drop from PG&E |
| 6.2 | Have walls framed on 1st floor | GCC | 02/20/05 | On-schedule |
| CURRENT AGENDA ITEMS | | | | |
| 7.1 | General jobsite cleanup | ALL | | |
| 7.2 | Weekly jobsite safety overview | ALL | | |
| 7.3 | Review/accept current 3 week schedule | ALL | | |
| 7.4 | Utility coordination for power to bldg. | ABC | 02/16/06 | |
| 7.5 | Steel delivery & erection (clear jobsite) | GCC | 02/17/06 | |
| OPEN RFI'S | | | | |
| RFI-012 | Door swing conflict Room 105, Hallway 118 | DFE | 01/16/06 | No resolution as of last meeting. Work is critical-path starting 2/10/06 |
| | | | | |
| | | | | |
| | | | | |

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Page 1 Of 1

Meetings can be a huge waste of time or enormously productive. A big factor in making this difference is a productive agenda followed up by good notes with action items.

Most projects have weekly meetings hosted by either the customer or general contractor. It is your responsibility to make sure that issues that affect your company are brought up and given proper attention.

Remember that the meeting agenda and notes will become part of the project record. Make sure that they accurately reflect issues brought up in the meeting and commitments made; especially those issues that can help or impact your work.

If you are a subcontractor AND the prime contractor is not holding weekly meetings, then you need to take a leadership role and make sure that at least the activities related to your work are discussed with your team and the other subcontractors.

Do not use this as an excuse to throw your hands up and blame the poor project performance on someone else.


In the end, it is your money and your project, regardless of how organized or disorganized your customer or the other subcontractors are.

The Project Action-Item List

The Project Action Items (PAI) list provides much more detailed information about what needs to be done and what got done on the project. The bullet points below describe how I personally use this form:

- Job Walks:** With the primary tool being a yellow legal pad, clipboard, and pen I walk the job thoroughly, noting every detail I can think of by room / area. I determine the frequency by walking the job approximately every 200 man hours.
- Make the List:** If your handwriting is neat (or neat enough), you can simply assign some names to the list, make photocopies and distribute to your team to execute. Personally, my handwriting is horrible, so I transfer the list into Excel and, while I'm doing that, I think about who on the crew is best suited to do the work, what things may be holding the work up, when the work should be done, etc. This process is the most valuable to me because it makes me think in detail about the job, production, etc.
- Distribute the List:** As soon as it is done I pass out copies of the entire list in the morning to the crew. What I've observed is that even average performers pick up their production when they have a detailed to-do list in front of them.

- Get Feedback:** Along with list, I always pass out highlighters and blue pens. I ask for the lists back in a day or two with activities that are completed highlighted off, and activities that can't be completed for some reason noted in blue pen.
- Documentation:** I file all these in a binder sequentially. If there was ever a question about what got done, by who, what specifically impacted them (sheetrock not being on the wall, etc.), then this binder will have that information.
- Start-Over:** With the binder in-hand, I get all the notes and such into a new list, re-walk the job with the yellow legal pad, and start the process all over.

| Project Action Items (PAI) | |  | |
|-----------------------------------|---|---|--|
| Project: | Large Shiny Building | | |
| Date: | 12/5/2005 | | |
| Updated By: | <u>Jim Martin</u> | | |
| LOCATION | DESCRIPTION | RESP | DELAYED / IMPACTED BY |
| SITE | Install conduit sleeves under curbs and sidewalk areas. Mark ends with 1/2" EMT stubs 3' high, painted orange | Jim | |
| SITE | Layout and drill all pole bases | Jim, Dave | |
| AREA 1 | Layout and box all power and signal | Sam | |
| AREA 1 | Run branch circuit power raceway | Peter | |
| AREA 1 | Run lighting branch raceway | Peter | |
| AREA 1 | Run Fire Alarm and Security raceways. Skip rooms 105, 106, 107 and hallway 102. | Debbie | Fire marshall has not approved all shop drawings yet - pending change in elevator mechanical room for heat detectors |
| GENERAL | Complete T&M change order paperwork for added PIV | Joe | Waiting on Field Directive number from GCC |

Sounds like a paperwork burden? Once you get the process down, you will spend about an hour per day on it. I GUARANTEE you will increase your productivity by far more than that if you follow this process.

One closing note on the Project Action Item list – be VERY, VERY detailed. Think about every time someone calls you on the radio or stands at your office door asking a question. What are the questions?

Where material is at? How to get in touch with someone? How exactly did you want to install it?

Group Activity: Your Project Action Item List


Use the blank lists attached to make a detailed list for your project. Then pass it to a person from across the room for them to critique.

Daily Job Journal

This is probably the most commonly talked about piece of documentation you are responsible for as a manager in construction. It usually takes the form of a bound book, though recent changes in technology have made some contractors switch to electronic versions.

At the end of a job, this document should be the primary tool used to generate a timeline of the project milestones and impacts from your company's point-of-view.

HEADQUARTERS
 555 Construction Ave
 Contractor City, CA 95555
 (555) 555-5555 PHONE
 (555) 555-4444 FAX

DAILY JOB JOURNAL


DATE: 12/5/2005
 WEATHER: Warm
 TEMPERATURE: 75°
 PROJECT: Large Shiny Bldg.

| NUMBER AND TYPE OF MEN WORKING | OTHER MAJOR CONTRACTORS ON JOB | | |
|--------------------------------|--------------------------------|----------------|----|
| General Foreman | 1 | Secure-It | 4 |
| Foremen | 1 | All City Mech. | 6 |
| Journeymen | 3 | GCC | 3 |
| Apprentices | 2 | | |
| Helpers | | | |
| Laborers | 1 | | |
| Equipment Operators | | | |
| | | | |
| TOTALS | 7 | | 13 |

TYPE OF WORK IN-PROGRESS
 Underground site lighting and branch circuit raceway

HINDERANCE TO JOB PROGRESS & BY WHOM
 Work slowed due to lack of staking on site work

SIGNIFICANT EVENTS, MILESTONES, ETC.

SPECIAL VISITORS OR PHONE CALLS OF IMPORTANCE
 Inspector came and signed-off pole bases / approved for concrete pour

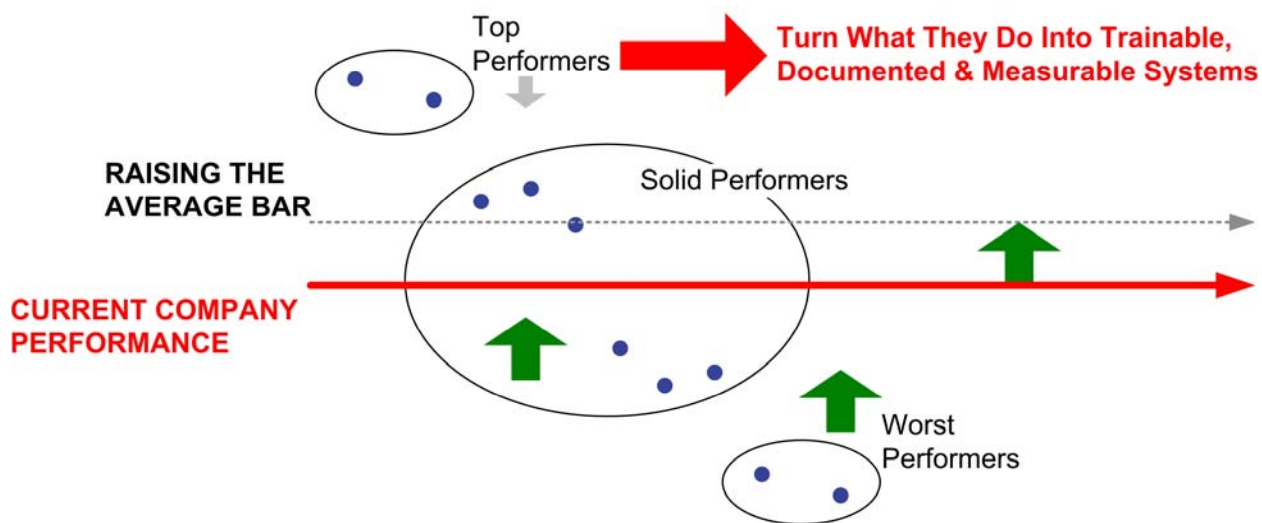
MATERIAL OR EQUIPMENT DELIVERIES
 Graybar delivered PVC & fittings

SIGNATURE: Joe Superdian

Where Spectrum Helps

Software will **NEVER** take the place of these simple best practices, such as walking the job daily, making action item lists, and planning the job a few weeks in advance. Many of these tools are still best suited to be done with pencil, paper, and the collective brainpower of the foreman, superintendent, project manager, and crew. What software is **VERY** good at is standardizing and tracking workflow processes.

Improving company performance levels IS NOT about improving the performance of top performers. It is about creating processes and systems that can help narrow the gap between the top performers and worst performers.



Most people do not think of the work they do in terms of a process with a series of individual, discrete steps. Star performers always have their own systems that are working well, even if they cannot articulate them as a process.

When a different system is presented, it is usually reviewed by the top performers, and their reaction is typically negative because it does not have all the features or flexibility they are used to. Unfortunately, many standardized project management system implementations have failed because of this very thought process.

Overall, a company is better off if their top performers suffer a slight loss of productivity by going to a standardized system, because the standardization will significantly improve the performance of everyone else on the team.

The biggest benefit a company will find when using a standardized system like Spectrum is that the workflow processes that the top performers use can be clearly measured.

“People don’t do what you expect – they do what you INSPECT.”
 – Lou Gerstner, ex-CEO of IBM

A simple example of this is shown at right to verify if people are filling out Daily Logs and having weekly Production / Safety meetings. The report simply looks at each job and the hours worked each day during the week.

| ABC Construction | | | | Daily / Weekly Project Record Verification | | | | | | | | | |
|---|-------------|--------------|-----------------|--|------|------|------|------|------|-----|-----|--------|------|
| | | | | WEEK ENDING: 08/06/06 | | | | | | | | | |
| This report is to be run weekly with payroll. Any days on the jobsite that have man hours need to have a job log entry associated with them. Any missing job logs that are missing will be shown highlighted red. | | | | | | | | | | | | | |
| JOB # | DESCRIPTION | PM | SUP | P | 7/31 | 8/1 | 8/2 | 8/3 | 8/4 | 8/5 | 8/6 | WEEKLY | |
| | | | | | M | T | W | T | F | S | S | HOURS | MTGS |
| 12345 | Project 1 | JOHNNY PM | SAM SPEED | | 8 D | 2 D | | | | | | 10 | P S |
| 12345 | Project 2 | JOHNNY PM | JOE JUST RIGHT | | 8 D | 8 D | | | | | | 16 | P S |
| 12345 | Project 3 | JOHNNY PM | TOM TOO FAST | X | 3 | | | | | | | 3 | P S |
| 12345 | Project 4 | JOHNNY PM | OLIVER OVER-BUC | | 20 D | 20 D | 20 D | 20 D | 20 D | | | 98 | P S |
| 12345 | Project 5 | JOHNNY PM | JOE JUST RIGHT | | 26 D | 26 D | 26 D | 26 D | 26 D | | | 128 | P S |
| 12345 | Project 6 | MICK MANAGER | TOM TOO FAST | X | 13 D | 13 | 13 D | 13 D | 13 D | | | 63 | P S |
| 12345 | Project 7 | MICK MANAGER | OLIVER OVER-BUC | X | 19 | 19 | 19 D | 19 D | 19 D | | | 94 | P S |
| 12345 | Project 8 | MICK MANAGER | JOE JUST RIGHT | X | 8 | 5 | | | | | | 13 | P S |
| 12345 | Project 9 | MICK MANAGER | TOM TOO FAST | X | 22 | 22 | 22 D | 22 D | 22 D | | | 109 | P S |
| 12345 | Project 10 | MICK MANAGER | OLIVER OVER-BUC | X | 9 D | 9 D | 9 D | 9 D | 9 D | | | 46 | P S |
| 12345 | Project 11 | MICK MANAGER | JOE JUST RIGHT | X | 4 D | | | | | | | 4 | P S |
| 12345 | Project 12 | MICK MANAGER | TOM TOO FAST | X | 19 D | 19 D | 19 D | 19 D | 19 D | | | 97 | P S |
| 12345 | Project 13 | MICK MANAGER | OLIVER OVER-BUC | X | 7 | | | | | | | 7 | P S |
| 12345 | Project 14 | MICK MANAGER | JOE JUST RIGHT | | 17 D | 17 D | 17 D | 17 D | 17 D | | | 85 | P S |
| 12345 | Project 15 | MICK MANAGER | TOM TOO FAST | X | 27 D | 27 D | 27 D | 27 | 27 | | | 135 | P S |
| 12345 | Project 16 | MICK MANAGER | OLIVER OVER-BUC | | 8 D | 8 D | 6 D | | | | | 22 | P S |

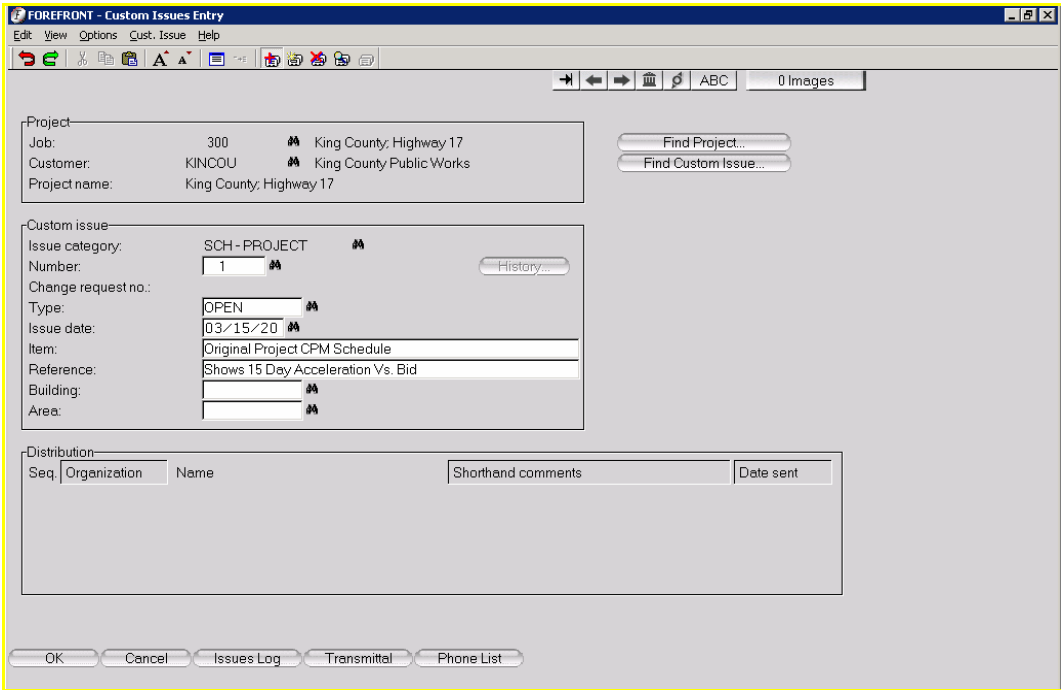
The quality control logic is simple: (1) If there were man hours on the job for the day, then a Daily Log should have been filled out. (2) If there were man hours for the week, then there probably should have been a Safety and Production meeting.

The report is simple enough – **RED = BAD!** Fix it! Reports like this should be built for all critical processes. For some processes, it only takes a few weeks of monitoring before everyone gets into a habit. At this point, the verification process can be used only for spot checking. Shown at right is a

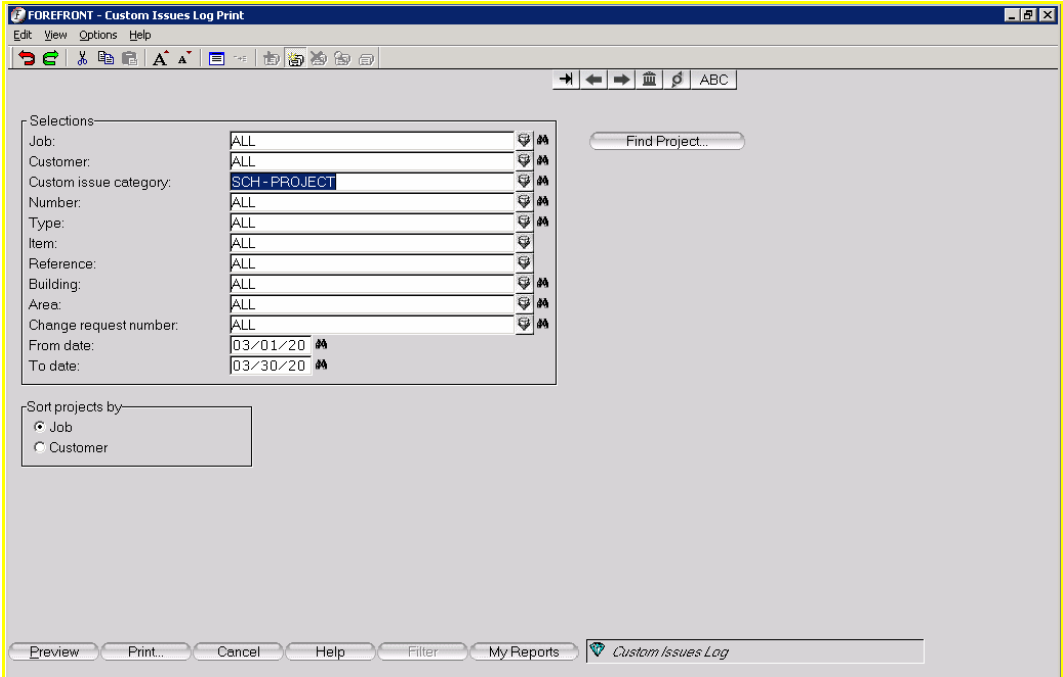
Logging Information into Spectrum

There is no single right answer to where and how to log this information into Spectrum. Below are some suggestions. Take notes to the right to see what might fit best within your current workflow processes.

- 1. **Project CPM Schedules:** Having a starting CPM schedule, and keeping it updated, is critical. This holds true not only for the success of the project, but also for documenting any delay or impacted productivity claims. Whether you are generating the schedule yourself, or whether your customer is providing the updates, these should be logged under Custom Issues.
 - a. You can set up a category called 'SCH – PROJECT' and store either a scan of the schedule or attach the schedule file.
 - b. Log by date and make quick notes. Should the schedule be used as the basis of a claim or change order, it can easily be attached to the Change Request.

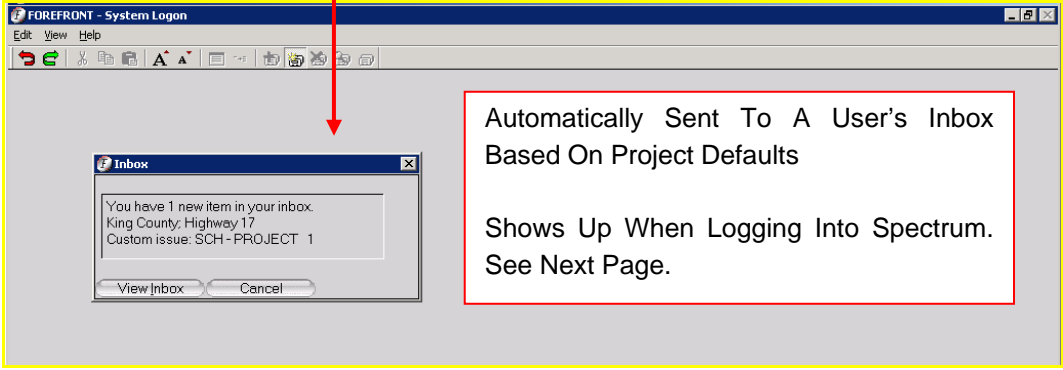
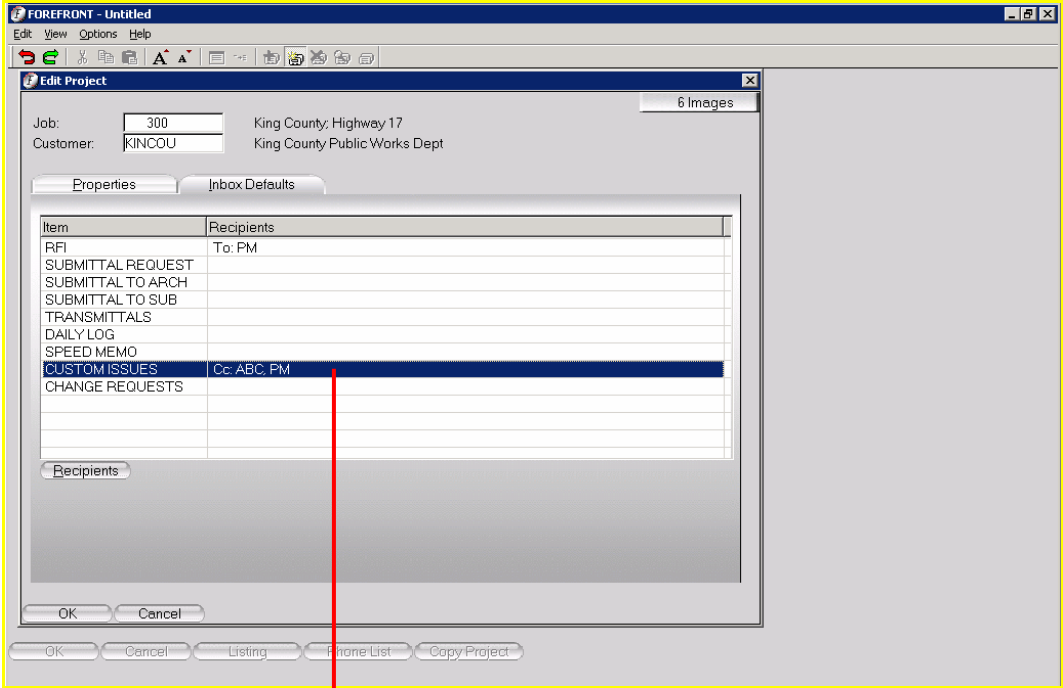


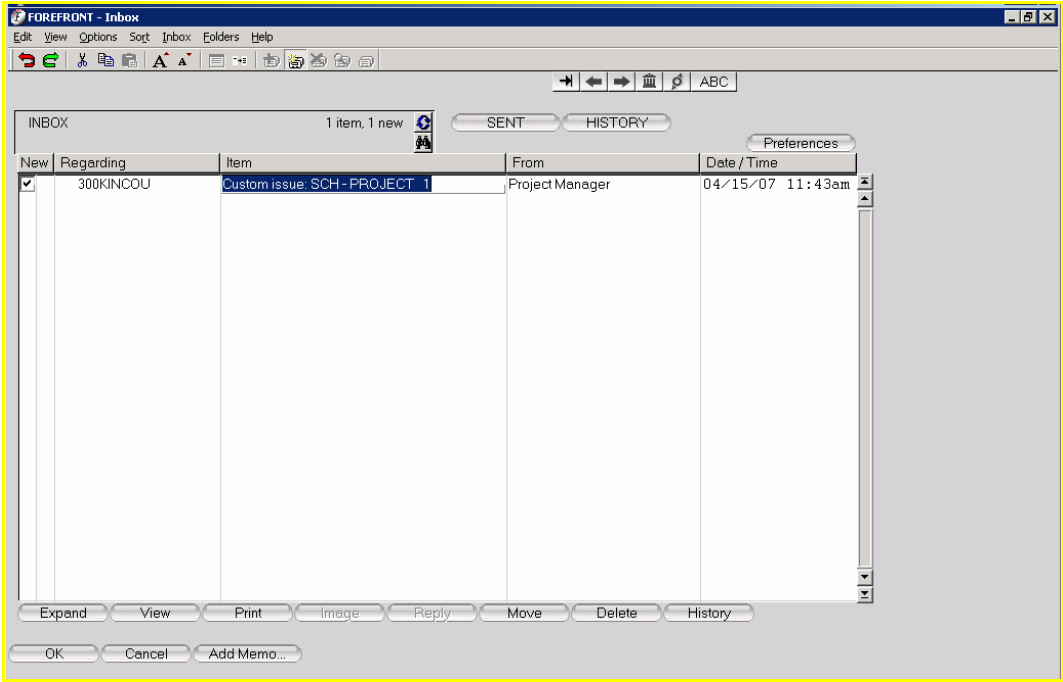
- c. With the CPM schedules and updates logged into a central system, it is easy to run a report to see which PM's are and are not



- 2. **Three Week Schedules:** Making sure that these are done on a weekly basis is huge. Often, the 3 week schedules are more useful in demonstrating the workflow on the project and impacts to production. Again, these are logged easily using Custom Issues and a category of 'SCH – 3 WEEK' similar to the project CPM schedules. They can easily be tied to Change Requests for things like minor acceleration, stacking of trades, overtime, etc.
 - a. If the 3 Week Schedules are done electronically in Excel or Word, they can be attached directly to the record. If a paper form is used in the field, then they can be routed back to the office, logged and scanned.
 - b. Using a verification report similar to the one shown above, you can monitor the critical weekly documentation and meetings. Just making sure that everyone is filling out 3-Week schedules on a regular basis will improve performance.

- c. By using the automatic Inbox Default feature in Project Management, you can have copies of Custom Issues automatically routed to the entire management team. Because it is electronic, it is very easy to quickly review. Senior management can now work on coaching and training to improve the overall scheduling capabilities of the organization.





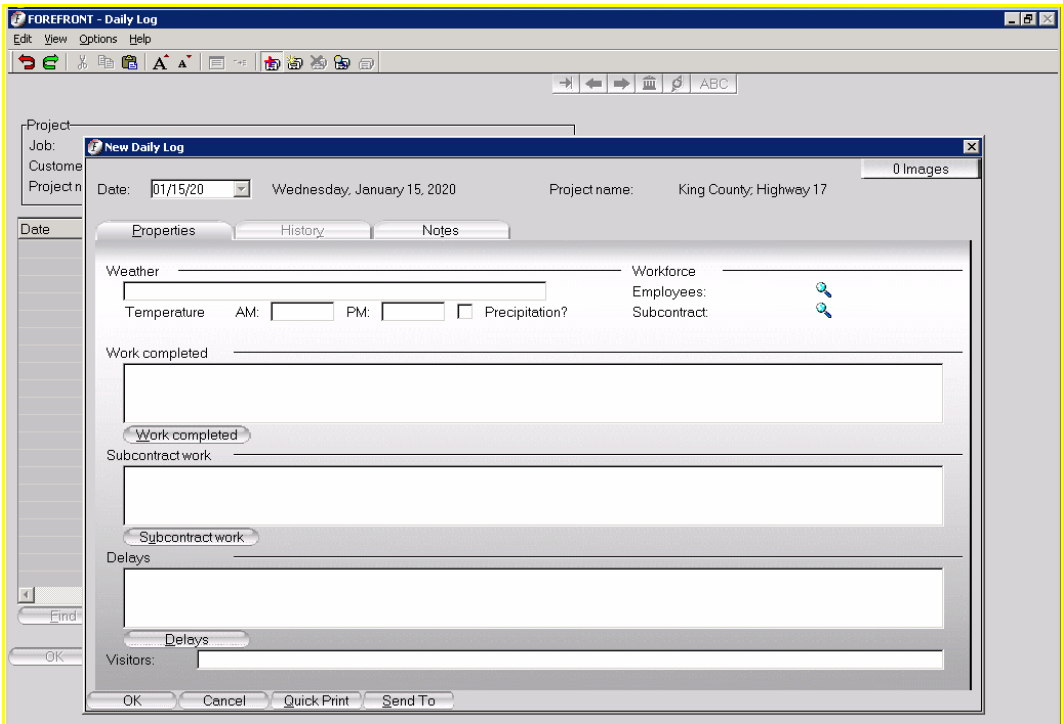
- 3. **Project Action Items / Punch Lists:** Like 3-Week Schedules, these can also be logged under Custom Issues for easy management and linking to Change Requests.
- 4. **Daily Logs:** Spectrum has a feature that allows for direct entry of daily logs as shown below. If logs are done in the field, they can still be scanned and stored using the Spectrum system, allowing for monitoring company-wide and easy distribution to the project management team, using the Inbox feature as described above.



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5. **Meetings:** If project meetings are held by others, or if you have a particular format that you like, then they can easily be logged using Custom Issues and a series of categories for different types of meetings.

If you are doing the meetings yourself, or want to track action items in detail, you can use Spectrum's meeting feature as shown below.

FDREFRONT - Meeting Notes Entry

Project:
 Job: 300 King County; Highway 17
 Customer: KINCOU King County Public Works
 Project name: King County; Highway 17

Find Project...
 Find Meeting...

Details:
 Meeting group: EVERYONE Weekly Meeting - ALL
 Meeting number: 5
 Date: 03/11/20
 Start time: 08:00
 End time: 10:00
 Closed date:
 Schedule status: On Schedule
 Attendees: KINCOU; MARSTO; 456GAR; AURFLO; FREPLU; HANBUI; SN

| Description | Status | Due | Complete | Assigned to | Type |
|---|-----------|----------|----------|-------------|------|
| Work In Progress | Recurring | | | | |
| * 1.2 Seattle Exit #5 | Open | 02/28/20 | | SNOCON | |
| * 1.27 Revise Traffic Detours at Seneca | Complete | 01/31/20 | 01/31/20 | ARCRUS | |
| * 1.3 Equipment to job site | Open | 02/05/20 | | SNOCON | |
| * 1.4 Grating replacement at the trench drain syst... | Open | 02/15/20 | | RENCON | |
| * 1.5 Install Signage | Open | 03/15/20 | | KINCOU | |
| * 1.7 Pole lighting along corridor (east side) | Open | 03/30/20 | | HANBUI | |

Edit New Delete

OK Cancel Print New Meeting Copy Items



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Summary

That's it – nothing more, nothing less. It is a very simple process, but most people do not have the discipline to do it each and every day.

The critical part is the daily list and the daily follow-up. Watch the best people you know and they will do this in some form, even if they never write anything down.

The secret to success is building the system, training everyone, and then following up with everyone relentlessly to make sure they are following the system.

You will have push-back. This seems like a lot of paperwork and, without seeing the results, it can seem like too much. Try it on all your projects for a couple of months, constantly refining the system, and watch your results.

Spectrum® Construction Software has a variety of modules designed to help manage projects and operations more efficiently that tie directly into the accounting system. Dexter+Chaney provides training and consulting services to help integrate these modules into your company's processes, providing a total management solution. Call your account representative for more details.

D. Brown Management provides a wide range of services to help improve Project Management processes. These range from customized training programs to specific process documentation for your company. Learn more at:

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