

Key ingredients of successful projects from four people on the front line.

20 Tips from the Top Project Managers

BY MARK V. HOLLAND, P.E., BARRY BITNER, BEN MERKLING, AND BOB TERPAK

FOUR EXPERIENCED AISC MEMBER FABRICATORS shared their thoughts on the keys to successful project management in May at the 2011 NASCC: The Steel Conference in Pittsburgh. This article is a summary of their tips and commentary.

Audio recordings synchronized with the speakers' PowerPoint presentations are available online for this session (N52) and many others at www.aisc.org/2011nasconline.

**Mark V. Holland, P.E., Chief Engineer
Paxton & Vierling Steel, Omaha, Neb.**

► **Tip One: Always Have a Schedule**

It may seem obvious, but it's important in order to keep your project on time. If you don't have a schedule, how will you know if you are on schedule? It's helpful to use a scheduling tool that features a "To Do" list with start and finish dates for each project task so that you can easily track your progress. And as with anything, unexpected situations can arise on a project. When something comes up, update your schedule with any new tasks and dates to keep everything on course. The scheduling tool will update the downstream (predecessor) tasks so you can let your customer know the effect of the changes. Remember, scheduling is a process and not an event.

► **Tip Two: Use a Project Kickoff Checklist**

This is a list of questions you should have answered or know the status on before starting any project. This includes background on the project and who is responsible for what actions on the job, which will help prevent any roadblocks as the project moves forward. You can start your checklist by recollecting your experiences or mistakes from past projects and writing down any of that learned information before starting the next job. To cover all of your bases, ask the sales team about what isn't in the contract but may be in the customer's mind. At the end of the project, a "Lessons Learned" meeting will help you build on your kickoff checklist for the next project.

► **Tip Three: Have a Standardized Folder System**

If you can have access to the information you need when asked about something, you will look more competent in the eyes of your customer. Always make both a hard copy and an electronic version of all documents, correspondence, and key information related to your project, and file it with a general identifier that you'll remember and can use for every project. If a main folder on your computer is becoming crowded with too many files, organize it with sub-folders. Being consistent in your folder system from job to job will allow you to find information when you need it.

► **Tip Four: Use a Day Planner**

Taking notes in a portable planner with corresponding dates will help you prioritize your daily actions and record key conversational points that you can look back on. Start your day by associating a priority number with each task based on how urgent and important it is to accomplish. It's a good idea to write your notes in pen so that they don't smudge as the planner wears and even use multi-colored pens to categorize each type of task. Review past notes to facilitate your actions for the day and always volunteer to take notes. The one who takes the notes controls the history of the project.

► **Tip Five: Share Your Model**

You don't need to be working on a major BIM project to share your project details and images with your customer. Consider setting up an online meeting and use the detailing applications you have to assist in getting your point across about a project.





Billy Bitner, Project Manager, Central Texas Iron Works, Waco, Texas

► **Tip Six: Understand Your Product**

In order to meet customer expectations and portray confidence, it's crucial that you know your product. Along with each new contract your project requirements will change across the board, from design to detailing, and it's important to understand the complexities of the product you're providing your customer. Customers expect that you are committed to their job and able to provide them with knowledgeable solutions when issues arise.

► **Tip Seven: Pay Close Attention to Details**

Customers expect their material to be delivered efficiently and their job built correctly the first time. When the complete structure is being erected, create a checklist of everything from delivery requirements to document requirements that need to be in place for every project milestone. Material that is not delivered on time means higher costs for your customer.

► **Tip Eight: Be Committed to Helping Your Customer**

Getting any job done right is a team effort. Always be available to your customer to help them resolve any issues on the job site and don't be afraid to offer suggestions based on your experience. For example, understanding your customer's delivery requirements and supplying your material to your customer by the time erection begins at the job site will help foster a team relationship and improve scheduling. It's also a good idea to

involve the erector in the scheduling process to ensure everyone is on the same timeline.

► **Tip Nine: Keep Your Customer and Project Team Informed**

This can be accomplished by weekly conference calls to cover any outstanding issues and discuss any questions your customer or project team may have. Especially during the fabrication and erection stages, these regular conversations about any updates or concerns will keep everyone in the loop and on track. However, don't wait until your weekly conference calls to get in touch with your client if something pressing comes up in the meantime.

► **Tip Ten: Utilize Your Available Assets**

Within your industry and your own organization, you should have a wealth of knowledge and experience available to you when you need it. Take advantage of your access to people who may be able to provide guidance and advice in any given situation—they've probably seen it before in their projects. And try using available software that may be beneficial for your particular job. Software use has really grown in the past several years and has helped improve job quality and production in many shops. But most of all, remember that your most valuable asset is yourself. Receive input from others but also rely on your own knowledge and skills to make decisions; that way you'll know you're making the right ones.



Ben Merklung, Assistant General Manager, Cives Steel, Wolcott, Ind.

► **Tip Eleven: Confirm, Confirm, Confirm**

Communication is the cornerstone of being an effective project manager, and an important piece of that is to always confirm what you're doing and why you're doing it. This concept is essential to keeping your project team and customer involved and protecting your business interests from a legal standpoint.

Here are some things you should always confirm with your project team and customer in every project: the Scope of your project (an overview of the project and who's doing what, when), Schedule (when, where and how you're going to deliver on your project), and Costs. Always confirm these things in writing and initiate a call beforehand to avoid any confusion and ease any discomfort about the subject.

► **Tip Twelve: Be Timely in All Phases of Your Work**

This is a critical element to building your relationships and proving to your customer that your project is in capable hands. Most importantly, being timely means being responsive to all questions that come up and confronting issues as soon as they arise. Here are a few tools that will help you juggle your responsibilities: re-prioritize your tasks on a daily basis; establish deadlines such as plant deadlines (for things like shop drawings), jobsite deadlines (what are you delivering and when), and any deadlines for contracts or legal matters; and minimize any surprises with constant communication.

► **Tip Thirteen: Subcontractors are Integral to your Success**

We all may be experts in our own field, but we're obviously not experts in everybody else's field. Rely on your subcontractors for their knowledge to help make your team successful. This starts

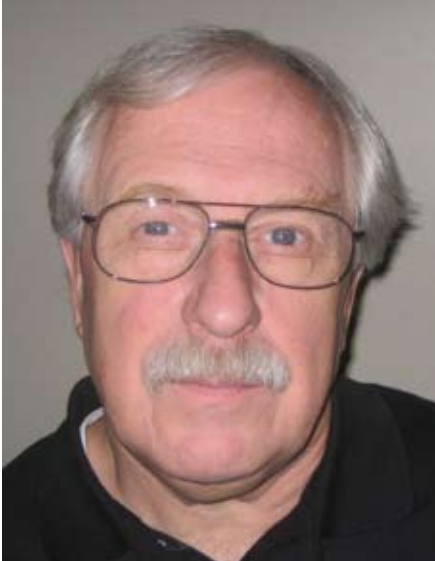
with clear communication with your subcontractor about scope and direction in the pre-award phase and then processes and reasoning in the post-award phase. Be flexible when asking them for information as you may be able to integrate their processes into your course of action, which will increase efficiencies for the whole team and benefit your relationships in the long run.

► **Tip Fourteen: Always Reserve the Right to Decide Later**

If you're in a meeting with a contractor who's pushing for an answer to a request right then and there, it's important to remove yourself from the pressure of the moment and ask yourself a few questions so that you don't commit to a response prematurely. First, ask yourself, "Can I answer this question?" Do you fully understand the request? Do you have the authority to answer this question on behalf of your team? Is everybody on your team aware of what you've been asked and will they fulfill that request? If the answer is yes, proceed with answering the question and confirm the request in writing. If the answer is no, you have the right to politely say, "I'll have to get back with you" and establish an action plan for following up with a response as soon as possible.

► **Tip Fifteen: Never Take On Issues Created by Others**

It's OK to become involved in issues from a helpful perspective and offer solutions that may help solve the problem, but don't take on the issue yourself and make it your issue. In order to help resolve the issue, you'll need to fully understand the objective and communicate with team members on all sides of the issue. But make sure you're not directing them one way or the other; those directly involved with the issue need to decide among themselves how they're going to tackle it.



Bob Terpak, Project Executive, Ohio Steel Industries, Columbus, Ohio

► **Tip Sixteen: Be Cooperative**

As a project manager, it's crucial for you to know the ins and outs of the project documents you're working with so at the end of the day, you're providing the customer with what they want. At the onset of a project there are many things that need to be taken care of at once, but your main goal is meeting and exceeding your customer's expectations. At the beginning of any project, request a meeting with the engineer of record as they know specific project details that no one else does.

► **Tip Seventeen: Pick Your Battles**

Picking your battles allows you to maintain control of your project. Contract documents can provide numerous traps that can impede your progress. Make the documents work for you and know exactly what's in them and what the requirements are for things like changes, percentages for quoted extras, insurance, and for billing and payment. If your contract manager has concerns based on the contract, gently remind your contract manager that they signed the contract document, not your proposal. And if your construction manager requests backup information, you can provide them with what they need.

► **Tip Eighteen: Avoid Surprise**

A common situation on projects is that a general contractor will be well-versed coordinating the primary sub-contactors, but, conversely, construction managers will not be familiar with the intricacies of production scheduling. Make sure you're on the same page with your construction manager and project team about what will be done and when. Give deadlines that are fully documented to avoid any miscommunication.

► **Tip Nineteen: Pursue Win-Win**

In his negotiating seminar, Chester Karrass makes this very important point: There's a better deal for both of us if we look

for it. Every project encounters some sort of problem down the line that even all of the notes and records and documents couldn't anticipate. This is when you need to call a meeting and look for a win-win solution for your customer and your company, and overcome that obstacle before you proceed.

► **Tip Twenty: Be a Teacher and Maintain Sense of Humor**

To be called a teacher is probably the best compliment a project manager can receive. Throughout our careers we partner with many different organizations as employees, joint venture partners and sub-contractors. In my 39 years in the business, the organizations that have listened and respected what you bring to the table are the ones that are still around. Can you recall a teacher who has made a significant impact on your career? The ones who take the time to help you and provide positive reinforcement are usually the ones you remember. As a project manager, remember that you are the face of your company to the owner and customer, and you're a leader in your own organization. Remember that you must serve as the positive influence for your team to succeed, and a little humor can go a long way.

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