THE COLLABORATIVE CONSTRUCTION PROCESS™

BUILD BETTER TOGETHER

GIANLUCA PASCALE
The Collaborative Construction Process™

Build Better Together

Gianluca Pascale
To My childhood self,
I haven’t forgotten you.
There’s more to come.
Here’s What’s Inside...

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Foreword

Dan Sullivan
Co-founder of Strategic Coach®

Gianluca Pascale has a new vision for the construction industry: one based on transparency and accountability. Drawing from his 30+ years of experience, he shares his innovative and collaborative process for both clients and construction management firms that will transform how you think about building your next project.

Joe Polish
Founder of Genius Network®

After 35 plus years working in the trenches of the construction industry, Gianluca Pascale and his firm, Centercon Inc.™, have laid out their unique process for delivering what they call, The Collaborative Construction Process™. This step-by-step process will show you how to set up smooth construction projects that result in trusting, collaborative teamwork oriented toward successful execution.
You’ll discover how to go from meeting construction contractors; to setting up clear communication and vision; to laying out important granular details; to effectively and collaboratively executing; to ultimately turning your dreams into reality. This process gives you a collaborative construction experience, helping you and your contractor build better together. If you want to experience more friction-free success on your construction projects, read this book now.
Introduction

I am passionate about construction and can honestly say, “It’s in my blood.” I grew up in construction, working with my father, Ettore Pascale, in his general contracting business, in Sturgeon Falls, a small Northern Ontario community. Having worked side by side with my father, I saw his commitment to the client and his willingness to do the best job with the highest quality, satisfaction, and customer service.

However, achieving the highest quality and customer service has never been an easy task. Many companies fall for taking the easy way out. This has resulted in an industry that is broken, antiquated and hasn’t grown beyond operating within the status quo for decades. Unfortunately, this has resulted in the construction industry living with a stigma worse than any known scam artist but it still operates under the same guidelines today. It’s all about lies, broken promises, deceit, and a total lack of accountability. The entire industry has become the butt of jokes.
This has to stop now.

The goal of my firm is to bring change to our industry with a system already proven successful for our company and our clients’ collective projects. You may be wondering why I would openly share my firm’s “secret sauce.” Why would I share our perfect recipe for getting a successful project accomplished while building solid and lasting relationships? The answer is simple.

How else can we expect to create massive change in the construction industry without sharing what is required to achieve that change? Therefore, we choose to lead by example. Everybody deserves access to our proven success system. That would include all of our clients, contractors, consultants, sub-trades, and suppliers alike. There is a better and much easier way to achieve optimum results. However, it will require some additional commitment from all stakeholders. And the payoffs are tremendous.
Introduction

My ideal outcome for this book is to educate clients and other stakeholders in construction; there are some seemingly minor tweaks to undertake, which will yield massive results. Inside, I will share many techniques, some of which are in plain sight. But, for some reason, these techniques have been frowned upon for the wrong reasons. By the time you have finished reading this book, my hope for you is that you see the value of relationship building, transparency, and accountability. By implementing our Collaborative Construction Process™, you will amass the success, and long-term relationships both our company and clients now enjoy.

To Greater Relationships and Successful Projects!

Gianluca
Chapter One

The Top Problems in Construction Today

“Insanity is doing the same things over and over again and expecting different results.”
— Albert Einstein

I’d like to dive right in with the top five problems I see in construction today. There are, of course, many more, but for now, we’ll stick with the top five. On the very top of this list are unrealistic expectations.

These unrealistic expectations usually are more on the client’s side regarding the time spent and money necessary to prepare for and complete a project. The second top
problem would be the use of unqualified, inexperienced, untrustworthy, and low-cost contractors. This soon snowballs to the sub-trades, suppliers, and consultants. The third top problem is poor planning. A good way to look at this problem is “reactive versus proactive.” The fourth problem is the tendering of the project rather than investing the time and effort in building up a relationship between the client and contractor.

When you go out to tender a job on the open market to people or firms you have no relationship with, where you haven’t invested any time in getting to know each other and building a team or a collaborative venture or partnership, you yield only lowest number results. Rarely are the overall fit, abilities, expertise, and track record taken into account. The fifth top problem is poor drawings and specifications due, in large part, to the client chiselling down the fees of the consultant. That’s a whole book in itself I could write, but I’m sure the consultants could give it a lot more justice.
The Costliest Mistakes

As I mentioned earlier, unrealistic expectations would be the big one on the list as far as the costliest problems. From the onset, the client has preconceived ideas or notions about their project, their wishes, their desired timelines, and how much they think it will cost. More often than not, those are miscalculated. Often, what we have seen in our past projects and witnessed in others is that they have been getting their information from the wrong sources.

From the get-go, they’re starting on the wrong foot, and although there are a plethora of other reasons that happens, I won’t shy away from the fact that we as contractors are partially to blame. A common problem that we contractors have is not being able to say no. This is amplified by the client having the innate habit of asking subjective questions. By subjective questions, I mean the type of question in which they are seeking answers to match or closely resemble their basis in impossible requests. If they have an idea of the project being either finished within a certain timeline or with a total cost that is unachievable, you can already see the
problems that will start to creep in—which, when not met, create nothing but animosity.

Creating Animosity

If you are creating animosity in such an early stage of a project that really hasn’t even started, you can imagine what that’s going to do to the relationship and to the project itself moving forward. Before I go any further, when I talk about contractors in this book, I include myself in this because I don’t want this book to be about trying to point out everybody but me. As the founder and CEO of my company, I speak from years of experience. I found myself making some of these mistakes in the past and learned from them.

The key thing here is that I learned from my mistakes and moved on to create better systems to prevent animosity from forming.

As I briefly mentioned earlier, as contractors, one of the big mistakes we make is always answering questions with “Yes” or “Absolutely!” If there is one word
that *does not* belong in our industry at the relationship-building or pre-construction phase, it is the word *absolutely*. We do not know each other, nor do we know all the particulars of the project and what it may entail. It is too early to be making such definite promises unless we are absolutely committed to this project and this client, which is achieved by mutual collaboration and emotional investment. We’ll cover more of this further into the book.

Another problem I see on a daily basis is the lack of transparent communication between contractor and client and vice versa. Therefore, unless you are absolutely committed to sharing everything valuable and crucial to your project’s success, you are setting yourself up for the rough ride that is synonymous with our industry. This can come at the price of hurt feelings, frustration, stress, anxiety, and diminished or depleted bank accounts. You need to be willing to be told the truth (because sometimes the truth hurts). You must also understand the value of relationship building. Likewise, as a contractor, not being committed to sharing and communicating the truth is an easy way to
not only lose the project but also ensures you never get a project from that client again.

**Zero Trust**

The second costliest problem is inexperience and the untrustworthiness of the contractor, and, in turn, the contractor’s service providers. Whatever I identify here is not only as a contractor but also a service provider. However, it all starts with the contractor. It’s all summarized by one saying. Have you ever heard the expression, “Champagne wishes on a beer budget”? Those are the same reasons this is the case. There’s always someone out there willing to go lower with the limbo pole. They’re always agreeing to lower their price without understanding what ramifications they are putting on themselves and their company. They are not considering what ramifications they are also automatically putting on their client, by agreeing to those types of requests.
Losing Relationship Collateral

No doubt, allowing these problems to persist costs time and money as they are both tied together. Time is our most precious commodity. It should not be a surprise that when you cost yourself time, you also cost yourself money. And although that is, in fact, the case, we must not discount that relationships equate to money as well. Therefore, when relationships are strained, we tend to overlook — whether purposefully or not — the attention, efforts, and commitment required to nurture those relationships throughout the project’s life cycle.

It’s a double whammy. Everybody’s concentration is fixated on time and money. It’s sad and unfortunate because that’s not where the answers lie. Those efforts are futile, and ironically end up costing, again, time and money. There’s a pattern that forms, and inevitably it begins eroding trust and confidence, only to be replaced with frustration and anger.

There’s an analogy I’d like to point out if you’d like to experience this visualization. Go to the bathroom and
stand in front of the toilet, and flush. That’s where everything is going; money and time all down the toilet. In essence, this gives you an accurate depiction of what happens if you remain fixated on price and time. Don’t get me wrong. Both are, in fact, equally important. However, the importance is best complimented when it’s coupled with capability, confidence, trust, transparency, and accuracy. All of which will drive a project in the right direction. Luckily, our Collaborative Construction Process™ is what will help you with that endeavour.

**It Starts with the Tender**

A typical tender today means you’ve been invited to provide a lump sum price for a project for a client. At that stage, it’s a potential client, and at that point, this client has already gone ahead and had their drawings and specifications completed. Many times, they are a dog’s breakfast because they’ve chiselled down the fees of the consultants. At that point, the only way the consultants can make money is by drastically reducing the amount of product
they provide their clients, and whatever product they do provide is often copy and paste. You start finding things on drawings and specifications that have nothing to do with what the client is ultimately trying to build.

The problem is these “diluted” tender packages are being sent out to a vast number of contractors. Typically, years ago, a tender process would have involved maybe four or five contractors at most, but now, you see no fewer than five. It’s typically more like eight to ten. I’ve even seen an instance where I walked into a pre-tender meeting, most of which are typically mandatory, with 17 contractors! Needless to say, I walked straight out.

If the project starts off using those documents to tender the project, the client will, in a short time, begin to see things unravel at a steady and sometimes erratic pace. Gaps will eventually form, large chunks of the scope of work won’t be accounted for, and ultimately, costs begin to creep up.

I cannot stress this enough. Do not start your project off on this foot. The money
you think you’re saving by negotiating price or scope of work with your consultants will pale in comparison to that which you will no doubt have to pay in addition after the fact. As your construction project is ultimately an investment you want to be proud of, one that will work best for you and your company, you must invest in properly detailed and packaged tender (and subsequently permit) drawings and specifications. Your drawings and specifications have a crucial role in your project’s success.

**The Problem with Preconceived**

A client often has preconceived notions that the more quotes they get, the more of a competitive advantage they will have over final selection and overall project budget. **Nothing could be farther from the truth.**

If you couple that with the fact your drawings are not clear or accurate, you have successfully put everybody in defence mode. You’re causing everyone to feel heightened uncertainty, which will manifest in one of two ways. The subtrades or suppliers will either price to what’s been
given, and have you pay the additional price for issuing drawings or tender packages the way you have.

This happens after the fact, which is extremely costly and unpleasant. And some lock in numbers that are exaggerated because they’re not clear on the final objective. This doesn’t get them the job, which in turn doesn’t help the client acquire proper comparable pricing.

I could go on, but the key takeaway to remember is you are about to embark on a very time-consuming, costly endeavour that doesn’t come together by clicking your heels. It takes proactive planning. I cannot stress enough nor highlight the importance of the word **proactive**. You cannot plan as it is happening because that won’t yield the results you want either. You must be proactive.

Relationships are equally important. A construction project is much like a marriage. *Netflix* will prove me wrong, but I highly doubt anyone out there would want to marry the first person they come face to face with. There is a courtship that needs to happen. The courtship builds a
relationship, that relationship builds confidence, and confidence builds trust.

By investing all that effort, you are making large sum deposits of trust into an equal trust account. The more you replenish and fill that trust account, the greater confidence and results you’ll have with the client, the contractor, and with yourself and the team overall.
Chapter Two

Fixing the Top Problems

“Old ideas will not create new conditions.”
—Raymond Charles Barker

In chapter one, we touched on the fact that a relationship needs to be established. It’s going to take an investment of time and effort to ensure you select a contractor who pairs well with you, your business, and your project.

It is not about finding someone who can build; anyone can build. It’s about who can understand what needs to be built and what they would like to have built. We aren’t looking for repetitive or cookie-
cutter-like builds. Sure, anyone can do it. But can anyone do it to your unique specifications, your expectations and your vision? I’m confident that’s not the case. Not everybody is meant to work with each other. You want a contractor who will take the time to understand you, your business, and your project. Someone capable and willing to pull out the relevant information required to understand what your vision is and what your expectations are.

I mentioned earlier that it is much like a marriage; you cannot commit to just anybody. You must spend the time to establish confidence and trust through the truth. A big mistake is agreeing to how the client expects their construction project to be executed. You must accept the truth, even though sometimes it’s not what you would like to hear. You need accuracy and transparency, which I find extremely important in relationship building. This is the basis of a solid foundation, and a strong working relationship, which I find pays dividends in the project as it moves forward.
Client Awareness

Many contractors have a sense the client isn’t self-aware, and it can appear that way. However, I believe a large percentage of them are very self-aware.

However, common misconceptions, preconceived notions, and limiting beliefs are all things that have them looking the other way and failing to deal with the elephant in the room. As I said, I have a strong suspicion that when clients are preparing for their construction project, they know what they should be doing, but for some reason, they don’t. Although money may be one of the driving factors, I believe fear is the other factor having significant relevance in their final decision.

To them, it’s all about money.

Think about the last time you purchased something based solely on price. How long did it last? Did it perform for the money you invested? Did it leave you in a jam, scrambling to find a replacement at the last minute? There are countless examples, but I won’t spend time on that.
What’s the Outcome of Fixing these Problems?

Fixing these problems will lead to mutual understanding and interactive leadership. Much like building construction, a successful project starts with a solid foundation, and that’s always based on communication. It removes the uncertainty, which is synonymous with our industry and surely felt by many clients before they even approach a contractor.

It eliminates the grey areas and replaces them with practical and factual information. It yields understanding and commitment, both of which foster partnerships and, concurrently, build lasting relationships. These are the relationships that yield results that make the needle move in the right direction. This means getting results that leave the clients extremely happy. They chose this delivery method, thereby increasing their confidence. They appreciate the horsepower required to produce and assemble everything for a successful project. Whether it’s information or the bodies and resources involved to take a project to successful completion, it’s the
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perfect way to deliver peace of mind for your client.

The Final Straw

I’m often asked how I came up with this process. What was the final straw for me that prompted the creation of the Collaborative Construction Process™? Truthfully, I noticed it from a very young age, from all the days on job sites with my father. I’ve been in this industry for as long as I can remember. One of my favourite pictures is of my father and me at a job site. I’m younger than ten years old, and I’m wearing all my working gear.
These early experiences helped me see that clients were living Albert Einstein’s definition of insanity, which is doing the same thing over and over again, expecting different results.

Another final straw was reaching my limit of the inevitable and unequivocal bullshit that comes with building in an “unacceptable” status quo.

Something that helped me create this change within our company and made me want to spearhead change in our industry was that we received a lot of compliments from our clients on our process — before it even became a full-fledged, described process. We then asked questions; we listened, we made the adjustments required to avoid duplicating previous mistakes, applied our lessons, and established our standards. In doing so, we’ve become acutely aware of who our ideal client is. This is another of the by-products of reaching the final straw.
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The underlying gift to ourselves was identifying our ideal client. The whole experience has been very valuable, one which has taught us a lot. What better way to celebrate these lessons than to share them with our repeat clients, our new clients, and with you?
Chapter Three

The Interview

“We are the imposters of the construction industry doing something that the ‘norm’ out there isn’t.”

—Author

The First Meeting

Now I want to jump into our process, step by step. And it all starts here. The interview is much like a first date.

Ideally, we meet at your facility or place of business, somewhere you feel most comfortable. This will enable you to have everything you need within reach. It allows us the opportunity to be introduced to your
business, key management team, and if time permits, tour your facility and operations. By enabling these comforts from the onset, we plant the seeds of trust and it sets a new standard. Trust is where a large portion of our collective success lies.

Our conversations are about you. We discuss your pain points, your past horror stories, so we can be sure to avoid them being repeated. All these conversations are had in strict and full confidence. Rest assured, there is not much we have not heard or experienced ourselves.

The project will require a rather large emotional investment from all parties involved to reach the level of success you deserve, and one we strive to deliver. That said, as these types of investments or efforts are seldom done in our industry, it comes as no surprise; the end of project results often mirror the lack of team building and planning, which are synonymous with how the construction industry operates in the status quo. Both contractors and clients are guilty of this. The solution requires both parties to acknowledge this is a two-sided issue.
Weaknesses and Strengths

To move forward in a positive manner, we ask that you openly share your and your team’s weaknesses as well as strengths. The idea behind this is to build our own, as well as our collective emotional investments. The more we work towards filling our reserves with knowledge, respect, confidence, and trust with each other, the better the outcome. It may seem small at first. However, every single bit of time and effort deposited equates to massive dividends throughout the project’s life cycle.

Listening is Priority #1

Our first and most important investment is to listen, and we do so empathetically. Seeking to understand the client is one of the most important deposits we can make into our collective emotional trust account. And it’s the key that enables many other deposits throughout our collaboration together. Whether we’re building or renovating your existing premises, the more we get to know you,
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your business, and your project, the better the results.

We enjoy listening and learning and find it extremely beneficial to understand your business overall.

• How do you do business?
• What is your market?
• What do you look for in an ideal client?

These are the types of questions that will uncover the information which will help us identify your idiosyncrasies, which will be utilized to customize your whole experience with us. We develop these discussions to help us understand and attain a clear description of your vision and expectations for your project. It also determines your success criteria, which would include an anticipated budget.

Client 1st Communication

The client is the key to success.

We make it all about the client. To understand what we must do, who we need to assemble, and what resources we’ll
need to achieve the optimum success for the client and the project.

*The client is also the end-user.*

Therefore, who better to start with than those who will put the premises and equipment to use? We may be in the construction business, but ultimately, we are in the people business, investing our time and effort in getting to know you, your business, and your project in granular detail. We must prepare ourselves to guide you and your project to meet or exceed your expectations. The goal is to build and sustain large reserves of confidence and trust with each key stakeholder. But first and most importantly, as this sets the stage for our work together, is our relationship with you.

**Avoid Repeating Past Mistakes**

I doubt anyone would sign up to experience or repeat the same mistakes over and over again. This is why it is important to identify past mistakes, pain points, or horror stories to set the rules of
engagement for the project. We are able to highlight the grey areas of uncertainty and replace them with clarity and assurance. Taking the time to do that empowers us to treat the symptom, not the problem. I know the usual saying is the other way around. But if we can treat the symptom, we can avoid the problem.

We treat the symptom, not the problem.

Our process enables us to do so by way of risk management and proactive planning. By emphasizing and utilizing these two means of discovery and outlining, we slow things down in order to speed things back up. Doing so allows us to treat it at the symptom level and avoid it becoming a problem.

It’s also a litmus test for us. If we find the potential client is reluctant to share this information, or is not forthcoming with any or all the information, we’re not the right fit for each other.
Understanding the Client’s Vision = Project Success

Ultimately, the client has the recipe for success. By following our process, it enables us to describe, design, detail, specify, source, employ, hire, build, and deliver based on their unique ingredients. It’s taking everything into account, including their vision and expectations. It allows us to execute a successful project efficiently and effectively. In addition, their success criteria give us parameters to establish matrices, which can then be utilized to measure and report the project’s progress and success.

Equally, when combined, the full measure can be used to encourage the client to celebrate each accomplishment and milestone along the way, something we find not many contractors do or offer.

One type of celebration I’ve seen is a roof top-up party. I have seen it celebrated a few ways. Either once the final beam is hoisted into place or once the roofing is applied and the building is water tight. It’s a tradition our industry has where a
barbecue is held for all site workers. An invitation is typically extended to the owner and their team members as well.

By involving the client and having them celebrate milestones and accomplishments, it is fuel towards the collective emotional trust investments mentioned earlier. It’s encouraging, and it makes them appreciate their and everyone else’s efforts and allows them to take ownership of their involvement in the project.

The key takeaway from this chapter is how important it is to realize we’re setting the stage for understanding the client and their vision of the project. There’s no second-guessing in our process. There are no grey areas. We’re removing and replacing all of that with facts, and with things that can be used as matrices of measurement. Failing to do that, you’re on a rollercoaster for which nobody knows how fast, how slow, how many peaks, and how many valleys you’re going to run into.
When you spend time in the interview stage, you’re getting to know each other, and you’re building trust, which ultimately leads to a solid team that will produce solid results. Solid results = happy clients. And happy clients = repeat clients.
Our second step in the Collaborative Construction Process™ is taking a deep dive. This second step would be based on a successful step one, which is the interview. From the interview, we would hope that you, as an existing or potential client, have been encouraged and have enthusiastically taken into account the line of questions and information we’ve requested. The results are that you come to step two energized, ready, and willing to participate and do
whatever is required to maintain momentum and for us to foster mutual trust and a solid relationship.

From there, we discuss your company’s culture. This will probably raise a few eyebrows, but it gives us a lot of insight as to who you are and how you operate. We look at it from the perspectives of both your company’s leadership and your team. It allows us to see things through your lens; it enables us to identify service providers who would pair well with or complement your company culture. This is the level of detail we seek in our discussions. It’s these discussions that are most important to the pre-planning stages of our process, and it’s these planning stages that set us up for success.

The Importance of Company Culture

Understanding your company culture and then looking at your project through your company’s culture lens enables us to identify potential risks or problems, and proactively deal with them before they become issues. Again, this is at the
symptomatic level. Those could vary from personality types to individual inabilities.

I hate to bring up an example like this, but it’ll clarify the value of looking at this culturally. It’s about meshing well with those who will ultimately become the ‘A Team’. They are the people who you will go in the trenches with. If you have a certain way of doing business, of working with certain types of individuals or companies, they are the individuals who complement you and your company. These are all cultural fits.

Now imagine hiring construction team members that are inexperienced and unable to understand the levels of commitment, trust and preparation required for a successful project. You will fall short of your goals and expectations. It’s no different with any of our service providers. We won’t be inviting any service provider we don’t feel is the right fit or capable of producing and/or delivering at the level you and/or your project requires, or we feel is needed.
Stakeholders’ Responsibilities

Identifying the key stakeholders’ responsibilities helps us best position those who will be deemed mandatory in helping with the success of the project. This applies more so to the successful selection and execution of any specific component of the building as well as the required equipment along with its location, positioning, and ultimate use.

For example, if you are building a new manufacturing facility with equipment that you’re either transferring from an existing facility or purchasing new. The department heads associated with those variables will definitely have crucial roles in us achieving a successful project. They are the ones who understand the best positioning and use of this equipment. That would be a key stakeholder we’d like to have involved in the project. It also enables us to leverage them, so they are collaboratively using their strengths and unique abilities. In essence, they’ll be helping where it’s needed and noticed most.
Everyone and Everything in its Place

There’s an old saying, “Everything has a place, and everything in its place”. That’s not only important for stakeholders, but it’s just as important for equipment. Let me be clear; it’s not about stacking the deck or assembling a huge team of people, each coming into it with a different perspective, opinion, or idea. It’s about having all the key people required to achieve what is envisioned by the client. It could very well be that some of these key stakeholders are only involved in the design stages and once again when it’s time to assemble and install said equipment. The truth is the people that know best are the ones working with it.

Wouldn’t it be unfortunate if you found out that the equipment you planned for and already have on the job site, wasn’t placed right or installed correctly? Let’s say Kristi is very knowledgeable in her department. She could have provided clarity on how to best position the needed equipment. Or where to best locate it for efficiency and ergonomics. Yes, it may take more time to figure all this out in advance of the job beginning. But sometimes,
slowing things down to speed things back up is needed.

**Getting Granular**

Of course, that’s a generalized example, but it is applicable because without us getting down to the granular level, errors can and will occur. I use the word “granular” because I’m thinking about sand. Granules of sand are so small, but those are the questions you want to be asking. The more granular you are with the types of questions, the more accurate you become with the planning and the solutions. For example, the drawings, specifications, and the equipment required for your future build. When you are able to get to the granular level, you will ensure you have an optimum building or optimum premise that works as perfectly as possible for the client and you will complete the job with the highest level of success possible.

The key component is getting the details of what’s required in your building and equipment to be housed. Also, the deep dive is about finding the answers to
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The R-Factor Question®. There is a lot included in this question, but for the sake of granularity, this question essentially uncovers what risks need to be eliminated and mitigated. What needs to be improved? The strengths you or your project possess that can be leveraged to achieve your vision and expectations. Those are the types of things we look to answer in this deep dive.

**Defining Success**

Additionally, you’d help us identify your company’s key stakeholders and representatives, as well as establish what their involvement will be in the project. We then like to interview them to understand their dynamics and strengths, so they’re best leveraged within the project and the project team.

Thanks to my coach Dan Sullivan, founder of The Strategic Coach® Program, we have implemented the use of The D.O.S. Conversation® by asking The R-Factor Question®:
“If we were having this discussion one year from today, and you were looking back over that year, what has to have happened in your life, both personally and professionally, for you to feel happy with your progress. Specifically, what dangers do you have now that need to be eliminated, what opportunities need to be captured, and what strengths need to be maximized?” Dan goes on to say: “Many people are not used to talking about the future in a focused way. They live in situations where daily conversations are almost entirely about the past and present.”

Think about it. Imagine the useful information that these two questions will uncover and how we can use that information to produce what we refer to as our Customized Communication and Execution Plan; the likes of which is assembled and submitted in the next step. We will explain this in the next chapter.

We see it as being the key to the vault. It gets down to the brass tacks. It allows you to describe your vision, your expectations, the risk management you feel will be required on your project, the improvements needed to meet your
objectives, and the current strengths of your project or organization that we’ll have available to leverage in order to create the desired outcome.

It allows you to describe what the ideal outcome looks like for you. This question empowers you to visualize and communicate your future and how you will measure the value we create. It also unravels dangers, opportunities, and strengths, which, in trust, are utilized to further customize your unique experience with us.

Our intention by the end of step two, is that you have increased confidence to proceed with engaging our firm by way of a financial commitment. We can then proceed by producing the customized communication and execution plan that will come in the following steps.
Chapter Five

The Promise

“Imagination is everything. It is the preview of life’s coming attractions.”
—Albert Einstein

At this point, our first two steps of facilitated communication will ultimately show us our differences, whatever they may be. In these steps, we attempt to increase our awareness of each other’s differences and create new insights, better opportunities, promote creativity, raise individual and team confidence, and build trust. To do that, we start with the end in mind.
Customized Communication & Execution Plan

Having amassed all the information shared during the first two meetings, we proceed to decipher and dissect it to create what we call a “Customized Communication & Execution Plan.” It’s much like a roadmap; we’ll call it CCEP for short. A CCEP is unique to you and your project, which makes it a single source of “standards” for how we collaborate on your project. It ultimately helps build confidence in the direction of the project. After all, how are you able to have confidence in a project if you don’t first have a direction?

The CCEP is straightforward and informative. It’s not quite “rider-like,” in rocker terms. Rock and rollers have a rider, which says they want to have X number of bottles of mineral water and the Brown M&Ms plucked out of the bowl. We won’t be plucking M&Ms from the bowl, but we’ll produce your very own rock-star-like list of dos and don’ts, which summarizes all the pertinent information shared.
Some of the information included in the Custom Communication and Execution Plan (CCEP):

- Summary of the overall scope of work.
- Key stakeholders determined so far along with their known roles and responsibilities.
- The required building components.
- Finishes to be used.
- Equipment needed and any pertinent information on it as well as location and positioning.
- What the building will look like.
- It may also include a sketch or artist rendering of the project.

At this point, we are also focusing on eliminating any guesswork that may have presented itself in earlier steps. Transparent and honest communication is the sum total of all the ways we establish certainty. This leads to identifying and documenting the key performance indicators, which we then record and track throughout the project to measure progress. If something that is
presented does not hit the mark for you, we will do our best to seek a mutually beneficial solution.

The Process of Collaboration

Don’t get me wrong; not everything presented in this step is set in stone. We are flexible. We do our very best to listen empathetically. If some interpretation needs to be adjusted or massaged, we do so. We describe the process of collaboratively working together. We refuse to equivocate with your customized communication and execution plan.

It clearly describes the desired results and the guidelines for achieving them. It lists the resources that will be made available to help with our collective endeavour, and outlines our commitments, and identifies the consequences if we break them. This step is about the power of listening and the value creation that it produces. We define your desired outcomes before the project begins. The culminated results are stepping stones to the synergy we are building between each other and the team. Ultimately, this is the
preview of your upcoming attraction. If you do not start with the end in mind, everything we’ve talked about isn’t possible.

This reminds me of a book I read, written by my friend, Cameron Herold, called *Vivid Vision*. The presentation of our Customized Communication and Execution Plan (CCEP) to our client is much like his “*Vivid Vision*”. We’ve taken what they’ve told us, how they envision their project, and their description of their success and reverse-engineered it. So, we can present to them what needs to happen and how it needs to happen to achieve that success.

**Communication and Execution Plan**

Essentially, the CCEP recapitulates everything that’s been shared in the first two steps. It’s the roadmap to success based on your vision and expectations. It’s all there for quick reference. It serves as a means of affirmation, clarity, and certainty that we understand you and you understand us.
This cooperative strategy, the Customized Communication and Execution Plan, will produce more by way of confidence, trust, and results than a conventional competitive strategy, proposal, or tender would produce. It enables us to work collaboratively as second nature, which negates the need for massive energy-draining efforts or cost-incurring mistakes or omissions. It’s the benchmark for your unique experience with us.

**Identifying Stakeholders Ensures Success**

In a successful project, it’s not enough to find stakeholders. It’s more about identifying those who will pair best with you. And as I mentioned earlier, not everyone is meant to work together. We need to ensure we choose the consultants we know will be the best fit culturally as well as specialty and capability. As each team member has important roles and obligations, they must be the best fit to accomplish those in a team setting. In essence, we’re building our dream team,
the team that will produce optimum results together.

By doing this, we enable you to experience a paradigm shift on what construction was like or was perceived to be by you and your business. By the end of this step, you will have increased confidence in us. There are tremendous things that come from that, such as the positive energy that collaboration will undoubtedly foster.

Once again, a few by-products that the collective efforts of all involved in establishing the CCEP will produce are: an established and focused frame of mind, clarity, confidence, and commitment. All of these combined, make for a very powerful combination which, when used individually or in a team setting, yield the results that can only happen when they are applied. Anything less is average at best. Therefore, in order to achieve the change the construction industry so desperately needs, our CCEP is no doubt a great place to start.
Chapter Six

The Launch

“Sometimes it’s the very people who no one imagines anything of, who do the things that no one can imagine.”

— Alan Turing

Less talking, more implementing. This is where we implement all we’ve learned from our initial work together. This is where we begin producing sketches, design drawings, design briefs, or renderings of how the project is going to look, and establishing a collaborative working environment. We lead by example and shine the light in order to show others the
way. We promote and encourage transparency. We help maintain focus and accountability for each team member. We attend to additional questions from the consultant team, ensuring the replies are made in a timely and efficient manner, and shared with all team members.

We begin reviewing the drawings and specifications that are produced and review them for duplications, omissions, and redundancies. Simultaneously, we start sourcing building components, finishes, and equipment. We source those for cost, availability, the lead time for delivery, and the overall fit for the end-user. In this case, that end-user would be our client. Once we have all this information, research, and results compiled, we use it along with the preliminary drawings to produce a preliminary budget and construction schedule.

**Establishing a Collaborative Environment**

What does, establishing a collaborative environment accomplish? First and foremost, it creates a safe space where everyone can be comfortable. I don’t want
to establish a space where people are reluctant to speak their minds or to share something they find important. I’ve seen this happen too often, and it doesn’t help whatsoever. It doesn’t help the results, nor does it help the team members; it only hinders them. And quite frankly may very well lead to missed opportunities.

Establishing and reinforcing commitment fosters courage, because working together, as people reach outside their comfort zones, they feel supported. It optimizes everyone’s unique abilities. Finally, it encourages confidence, all of which I’ve previously mentioned, add each their value in producing trust both individually as well as a team. Ultimately, if we trust each other, we will go further as a team. Best results come from trust, and trust comes from confidence, which in turn, stems from our willingness to be authentic and vulnerable with each other.

Duplications Omissions and Redundancies

First and foremost, duplications, omissions, and redundancies cost time and
money. Although our process is, in fact, unique, some of the matrices and criteria involved are the same as what others do; we just choose to spend more time addressing them. Remember this: pay now or pay later.

I’ll tell you from my heart, always choose to pay now. By pay now, I mean invest the time and spend a little bit of money in addressing these things, rather than assuming they’ll fit or assuming they’ll work, only to find out later they don’t. You either cannot return it, or we have restocking fees, delay claims, or additional costs associated with repairing what could have otherwise been rectified at the infancy stages of the project. Later it will always cost more. Besides, why do something later when it can be done now?

Another beneficial by-product that is largely overlooked, which comes from periodically reviewing the drawings, is that everyone acquires a superior level of understanding of the project and all its moving parts.
Industry Standards

These methods are not the traditional industry standards, but I’m not going to say it’s never done. Some contractors have the benefit of having relationships with their repeat clients, but those ones are much larger in size and reach. You don’t get to that size by not having long-standing relationships and not understanding your clients. Some do, but the vast majority don’t.

Establishing Preliminary Project Budgets and Constructions Schedules

There’s a variety of benefits in producing and introducing a preliminary project budget and construction schedule. One is, you provide a cross-reference to the initially desired budget. This may lead to design and equipment changes or modifications to accommodate individual or overall costs. It may be that, by the time we price it, a client realizes (as an example); “Whoa, I guess it’d probably be best that I look at X equipment rather than Y because it’ll save me some costs and lower my overall budget.”
It will verify lead times of the desired or specific equipment, components, or finishes. By the lead time, I mean, how long it will take to get the desired equipment, building component, or finishes. It will provide a true representation of what those two KPIs (Key Performance Indicators) look like, both from cost and time perspectives.

We may need to rethink the overall project time due to unforeseen circumstances. Up to this point, we may have thought that X amount of time would be enough, but maybe by taking these deep dives, we achieve a level of understanding that our initial time allocation for the overall project was not enough.

This is where, by producing a preliminary schedule, we can extend it and make room for it. Speaking of which, allocating room for the unforeseeable or just allowing some room for flexibility is a good practice, one that is seldom allocated mostly due to the pressures imposed by the client and the fear of losing the project. However, making the overall schedule more flexible improves the final costs. Because, once you’re committed to the
financial and time portions, the likelihood of the costs increasing due to changes or modifications to the schedule increase along with it. With proper preparation, we can eliminate those, or at the very least, mitigate them.
By now, the process is a bit more in the revision stage, this time, with you in the passenger seat. The drawings produced by this stage will be sufficient in that you will have a good indication as to what your project will look like from many different viewpoints. Although we previously were looking for duplications, omissions, and redundancies, at this point, we would be reviewing the information found on the
drawings and specifications for accuracy and application.

Review descriptions of type, form and function of selected building materials and finishes. Are there any other details or information that could be inserted on the drawings in order to provide absolute clarity as to what is ultimately desired? We then refine plans and specifications incorporating your feedback.

Check... Check... Double Check

This is an excellent time to review the project for fluidity. Your project is detailed by way of layered drawings, building information modelling, which is done at a 3D level. Also, there’s now another one we want to start implementing, which is five-dimensional (5D) modelling, which integrates design, cost, and schedule into a 3D output. It is extraordinary. It dissects the building in a way that not only tells you if there’s interference, but also how much of what is needed to assemble your building. Essentially, it creates a takeoff for every component of the building so we can cross-reference final costs.
All these efforts provide future efficient designs, performance, and costs. These efforts are all for the good of the project and ensure efficiency in all aspects.

Also, this level of detail increases the likelihood of like-minded, high-calibre service providers wanting to participate in the tender process. I mentioned the tender process earlier. I’ll explain this a little bit further; we go out to competitive bidding for all our service providers based on an established list of trusted subtrades and suppliers. By increasing the details, you increase the likelihood of these high-calibre trades being interested in your project. They are the trades that value their time, expertise, and knowledge. I’ll be very blunt; these high-caliber service providers won’t waste time on projects that are poorly detailed, poorly drawn, or poorly specified.

Gathering the Best

By now, a carefully selected pool of trades is assembled for each division. Ultimately, you will choose one of each
division to join the construction team. Additionally, we turn to our trusted resources and send out our completed — to date — work for an additional independent review done with fresh eyes. We like to turn to our trusted friends and business acquaintances in the industry and ask them to have a look at the drawings and specifications to have a fresh pair of eyes go over it and make sure there are not any blind spots we’ve overlooked. Again, a double-check wasn’t enough. A triple check is what we like to introduce. Concurrently, we also produced a permit set of drawings, which is submitted to the city for permit application.

**Why It’s Important to Review Drawings, Project Details, and Specifications**

The importance of reviewing drawings, project details, and specifications cannot be overstated. The reviews are all in the interest of catching mistakes before the drawings are sent for a permit or competitive tender. Changes during the design phase are more fluid, and as such,
easier to address, and more importantly, less — if at all — costly.

They avoid overlap and interferences, more so with the building services. They verify the efficiency of building envelope, components, finishes, and equipment and ultimately ensure fluidity of execution. Should changes be required, there are typically no commitments to be broken at that stage.

We can ensure we’ve brought in the high-calibre service providers by having well-documented, detailed drawings and specifications, being organized, forthcoming, accurate with all the information, and finally, by asking for feedback.

*The importance of going through these steps is producing drawings and specifications, which will speak volumes when they hit the streets in acquiring competitive tendering on each division.*

It’ll send the message we have our proverbial shit together, we’re ready to get going, and we’ve thought about as much as what can be conceived. We also ask for
feedback in the pre-and post-tender processes, but we’ll cover that in the following chapters.
Chapter Eight

The Contract

“Good paperwork makes good friendships.”
—Author

At this stage, we’ve produced a detailed set of drawings and specifications, which have been packaged for tender. Those have been issued to our established list of sub-trades and suppliers, all being carefully selected to pair best with you and your project.

I’d like to highlight that not every trade we have in our arsenal is meant for your project. Some are going to come highly recommended, or they’ll possess strengths, capabilities, resources, and expertise that’ll
make things run more smoothly. This will help us ensure we meet our collective objectives and we all achieve success.

The Pre-Tender Discussions

We conduct pre-tender discussions with each service provider to discuss the project plan and vision to establish clarity, thereby eliminating unwanted or unnecessary omissions or additions in their proposed costs. These discussions reduce guessing and therefore improve pricing by answering any underlying questions or concerns that they may have, therefore providing them with clarity. It provides them with the assurance they seek and the understanding that is required in order to provide their competitive bid with confidence.

Other than the typical Requests for Information (RFI), there is no other way the service providers are able to get their questions answered. And I can assure you that if they don’t acquire the level of certainty that establishes clarity, provides direction, and improves their confidence, you will notice it on the formal proposal.
They’ll inevitably submit a number that mimics their uncertainty which is most often elevated or, if not elevated, accompanied by a long list of qualifications of items not included in their price, or sometimes both.

**The Importance of Pre-Tender Discussions**

Having these discussions will yield certainty, and when people are certain, they’re confident in themselves and their estimates. They don’t plug in allowances or overinflate their numbers due to uncertainty, and it also sets the stage for collaboration. These conversations are, ultimately, another means of saving money.

By increasing clarity, certainty, and confidence, service providers are much more engaged. Their creativity and capabilities are stimulated, which leads to innovative and competitive pricing, and they automatically become emotionally invested in the project, which increases their involvement and competitiveness. Concurrently, we’re having multiple
touchpoints or feedback with the client that continues to layer the process of trust and relationship building.

I’d also add the fact that it’s educating them. I say this with all respect. I go to a mechanic to fix my vehicle because that’s what he or she does for a living. I’m not about to prop my vehicle up and start changing my transmission on my own because I have no idea how to do that. This is much like our clients coming to us and entrusting us with executing their construction projects. That’s what I mean by “educating them.” It may be that educating them also means breaking their preconceived notions or enabling them to experience that paradigm shift from how they looked at construction before. By having all these touchpoints or all these steps, we’re keeping them close. They remain part of the process throughout, and it improves the overall experience for them and ensures we all exceed expectations.
Project Budget and Commitment

We then competitively tender your project to those listed. We tend to all requests for information and document those accordingly, making every question and answer available to everyone equally. Once the predetermined tender closing has elapsed, we conduct a post-tender analysis of all of the submitted bids. We carefully decipher all the bids and their qualifications, meaning what they’ve included and what they haven’t included, to ensure clarity and confidence in the final selection. Once all this information is processed, we make our final trade and supplier selections and produce a construction budget and schedule. We accompany those two documents with the project plan for all stakeholders. Finally, upon completion of steps three to five, a contract is formalized, and a second financial commitment is obtained from you, our client.
Chapter Nine

The Plan

“Luck is what happens when preparation meets opportunity.”

—Seneca

Two heads are better than one. This speaks about us going to selected sub-trades and suppliers for the review of the drawings and specifications, which quite often yields additional time and cost savings. We call that *value engineering*. We have them look at the overall project and see if there’s not something that can be done to streamline time or cost or both. This is done on their own with their team and resources. I
realize this may sound too good to be true. But the truth is, highly engaged, enthusiastic, knowledgeable, resourceful, and passionate service providers will jump at the chance to bring positive change to the project. This is achieved by cost savings or overall planning. Don’t get me wrong; this is not all due to our discussions. We must not discount the quality of service providers. Another valuable takeaway is: *We are all as good as who we team up with.*

**Pre-Construction Coordination Meetings**

We then organize a pre-construction coordination meeting with those very same service providers on their own and come together as the selected project team. As an example, the building services trades; plumbing, sprinkler, HVAC, and electrical are the predominant ones where some significant value engineering might occur. The purpose of this meeting is to further value engineer their respective individual division and also collectively come up with additional time and cost savings.
By putting them in the same room, we might be able to come up with collective time and cost savings.

As previously mentioned, those can come in various ways. These pre-construction meetings are a crucial part of establishing communication, confidence, and trust among all construction team members. By setting the stage for a cohesive and safe working environment, we have noticed and experienced significant returns mainly due to the collaboration of all its partners.

Once all the cost savings are documented, we submit them to the consultants for a final review. We then present them to the client with our recommendations. Those cost savings, if approved, are then passed along to you. Once this process is completed, we proceed to award contracts and purchase orders for these service providers, establishing the vital and often very poorly documented and managed contract management portion of the project.
Finding Cost Savings

Cost savings will vary. It could be materials, components, overall engineering of a system or service, as well as the timing of it all. Quite often, one of the places where we can find cost savings is in the electrical servicing as well as the selected fixtures for the project. A project we worked on most recently is a perfect example of that. Our electrician reviewed the electrical drawings with their estimator and their electrical engineer, who collectively proposed some changes to the electrical service as well as two types of lights that were specified for the project. These recommendations allowed us to provide alternate solutions that produced $125,000 in cost savings.

Those changes were reviewed by the electrical engineer of record, who approved the proposed work, which was then approved by the client, who ultimately saw their budget decreased by 125K. Not bad for allowing someone else to review the overall project. For anybody reading this book also, I don’t want this to be misunderstood. It’s not because the consultants did a bad job that we’re picking
up these cost savings. There are many ways to skin a cat.

Allowing somebody else’s interpretation may provide options that are derived from looking at it through a different lens or from a different viewpoint. It’s them saying, “You know, have you ever thought about this, or would you entertain this way of doing it?” It’s not to paint the consultants in a negative light. I want to be very clear about this.

Ironically, the next point I want to make is that value engineering doesn’t mean the original work wasn’t compliant. It means whatever it is, got a second look. There are many ways to achieving a common result. We empower our service providers to provide that and help the project before we even start on site. Again, massive team building occurs when we put all our heads together. Imagine the increased momentum when collaboration is encouraged.
**Contract Management: It Starts Before the Job Does.**

The typical job starts as soon as it is awarded. I mean that literally and figuratively. It’s like we’re all caged in starting gates, and the tender award is the gun going off, which is thereby followed by everyone losing their minds, and the barking of orders quickly ensues. What I am about to share with you will save you tons of frustration and lost time. Apply them and reap the immediate rewards.

I rarely see any time devoted to contract management at the beginning of the project. It’s more, “Here’s the project. When can you start?” We don’t do that. We invest a lot of time in setting everybody up properly. Issuing contracts and purchase orders, requesting insurance certificates, health and safety-related documentation, and training certificates, as well as other mandatory and policy (ours) driven documentation, is more important than starting the project haphazardly. While doing so, we simultaneously action the ordering of all long-lead items — those not requiring shop drawings being submitted for review and approval.
Shop drawings are another topic that is seldom given due respect and importance. An example of this would be building materials, components (concrete reinforcing, structural steel, etc.), finishes, and equipment. I want you to think of how well your site will operate if you choose to start the project guns blazing without having put any emphasis on preparation and planning concerning all of what is mandated and required to execute a project fluidly and safely. Yet, countless clients and contractors still proceed without having done much or any of the aforementioned list.

It takes devoting time to properly set your project up so that it runs smoothly. Without this commitment, you are constantly chasing your tail. It should now come as no surprise as to why projects quickly go off-kilter.

After Plan Project Flows

Our role on-site, or at the office until the successful completion of the project, is much like a conductor to an orchestra. We orchestrate and coordinate the
performance, and accountability of the construction team. We establish and maintain clear and well-documented communication and construction documents. We maintain updated records on-site and at the office, as well as our online document portal, which can be accessed by all project stakeholders. We manage all contract documents’ submission, review, and approvals. We request and review all site-specific documentation on health and safety. We make sure everyone has what they need and is doing what is supposed to be done by delegating, not micromanaging. In other words, we see the project through to the goal line.
Chapter Ten

The Follow Through

“The most powerful warriors are patience and time.”
—Leo Tolstoy

This is where we turn your dreams into reality. It’s also where we know you’ll begin to feel massive shifts in your paradigm of construction, and our proactiveness will pay huge dividends. Like a well-oiled machine, things run smoothly, which therefore allows us to concentrate on those moving parts.
We don’t sit there expecting things to run on their own or waiting for problems to occur. We aren’t driven towards reactiveness. We coordinate, we manage, and we orchestrate. We implement your Customized Communication and Execution Plan with all site activities and progress. We monitor the health and safety of the site, as well as every worker and visitor. Health and safety, by the way, is non-negotiable and strictly enforced. Failing that could very well be a detriment to the project, its workers, our firm, and yours.

Daily Oversight on the Job Site

We can see things as they happen. We foresee problems before they occur. Mistakes can be pinpointed, and we can quickly move to coordinate and orchestrate the remedial work so that our service providers can concentrate on their work. This enables us to have a quicker response time in avoiding or mitigating loss of time or the incurrence of an additional cost. Last but not least, it’s leadership. You cannot
expect to have a well-run site if no one is there to maintain control.

**Biweekly Meetings**

We conduct biweekly site coordination meetings. They typically are first thing in the morning and are with the site construction team. These meetings involve the “nuts and bolts” of the project. At certain milestones or required inspections, we also include the consultants in these meetings.

The second meeting — typically held immediately after our site coordination meeting — is with you, and if required, the consultants. Conducting our bi-weekly client coordination meetings allows us the opportunity to share everything that’s current and of importance. They also allow us to address any questions or concerns the client may have had the previous week or is anticipated to have that day. Both of these meetings help ensure clarity, continuity, progress, compliance, and accountability.

We then manage and report all the project’s ongoing activities, progress,
meeting minutes, and updated financials utilizing your Customized Communication and Execution Plan.

It may be, you would prefer to have your financials reported in a specific way because your accounting department has a certain way of receiving and/or inputting their financials. Our Customized Communication and Execution Plan would pick up things like that, and we’d have the chance to update our financials and communication to you in that fashion.

The site activities and progress sometimes uncover surprises, changes, or problems. We are proactive in that we request solutions and any options along with the implicated time and costs — those being whether they are additional or credit — from the affected service provider(s).

*We also encourage and work with our service providers to come up with solutions or alternatives that have a net-zero impact on the project’s overall schedule and budget.*

Changes that come up don’t always come with a plus or minus attached to them. Sometimes it could be that we’re able
to maintain the status quo. There might be a quick change or pivot, but it doesn’t change anything concerning time or cost. It’s important to note that our industry is synonymous with pointing out problems and equally with making them your problem. That’s not how we do things. Our job is to keep you out of trouble, and we do that by doing what I described above diligently.

The Not So Secret Ingredient

The biweekly meetings are our not-so-secret ingredient for a variety of reasons.

It keeps everyone working where they should be. We’re able to discuss site activities, progress, problems, or obstacles openly. It simultaneously allows us to help remedy the problems or obstacles and do so immediately. It will enable us to highlight areas of work that could be started collectively.

We discuss the health and safety of the project and address any infractions or improvements that need to be made and hold all involved accountable. It’s a source of information. We do this for the good of
the project but also to keep you properly informed. It also allows us to plan inspections ahead of time. It allows us to walk up to something that was tabled and address it and gain some insight from it. Essentially, doing so on-site, you have something to point at, touch, view, and address. It continuously strengthens collaboration and teamwork and its cohesiveness. It keeps everybody accountable and working like a well-oiled machine.

Everybody in the industry should be having these types of meetings, and probably most do. However, how they’re conducted is where the difference lies. I’ll give you an example. When we have our site meetings, we tell everybody to turn their phones off, or at the very least, put them on vibrate, so we have their full attention. Another thing we do also is we have a prop. In our case, it’s a small totem pole that we pass around the table. Whoever is holding the totem pole can speak, and whoever’s not, your job is to listen.
Why are We Here?

These meetings are about engagement. We do not want anyone attending these meetings as a benchwarmer. Everyone is expected to be there for their involvement and expertise. That’s what’s expected, nothing less. By having everybody listen and be present, I feel everybody understands what everyone else is up against. It is, in fact, about teamwork. If there’s any way we can collectively help someone or a service provider, this is where we put our heads together, we team up, and help each other out. Quite honestly, by helping each other, we all achieve the same results, and better yet, we achieve them in the timeline we wanted, and believe it or not, we also make the overall profits we want.
They say that the last 10% of the project is the hardest. Although there is definitely truth to that, we don’t quite feel that way. We take a huge proactive stance on this and begin conducting our very own deficiency walk-throughs, thereby creating our very own deficiency list, which is documented by room number or location, and identifying the trades associated with each deficiency.

“He or she who controls the pace controls the victory.”
—Unknown
Building Proactive Deficiency Lists

I want to touch on the proactive deficiency list. We make this proactive deficiency list because we don’t want to wait until the end. If we wait until the end, it’s exactly that. It’s the end of the project. We’re polishing the shine on things. My firm feels that’s not when you should be addressing deficiencies. You should be addressing deficiencies as you finish the work, and by doing this, it gives you a much bigger heads-up as well as the ability to undertake them, because you’re still at a point where you have the bodies on-site to get things done.

If you wait to the very end, you’re subsequently minimizing the number of people you have on-site, which makes it a lot more difficult for you to start knocking off a deficiency list produced at that time. This is why we go to the added effort of producing one earlier in the project.

Here it is on a bumper sticker: The last 10% of a project are the most difficult.

The more the reason to ensure communication is fluid; everyone is focused, committed, and accountable.
**Proactive Deficiency List Uses**

We issue that deficiency list to all service providers who can proactively repair, retouch, or replace whatever isn’t compliant or acceptable. This provides a massive head start to what will ultimately be a deficiency walk-through with you and the consultants. Doing so at an early stage enables us to save time. Failing to undertake this proactive measure would otherwise see us staying on-site longer than expected, and quite frankly, wanted. This proactive endeavour also enables us to ensure the turnover and subsequent site demobilization occur seamlessly. There are a lot of moving parts in the final stages of the project. It’s ideal to remain on top of them.

**Fix it While Onsite**

We’ll list everything way before the final walk-through. Quite frankly, there are many things I’m proud of, but one of them is how early we produce our very own deficiency list and hammer out whatever is listed while we still have the personnel and horsepower on-site. If we wait until the
end, when everybody’s vacated, it’s hard to bring them back because they’ve moved on to other projects.

It’s not to say that our service providers don’t want to give us the last bit of effort. That’s not it. As work is completed and the staffing requirement diminishes, so does the opportunity to repair or replace deficiencies. And seeing as though they will remove unnecessary staff, it can also be challenging to bring them back as they will have placed those familiar with the project elsewhere. Therefore, it’s better to address it while they’re there, and while there’s still time to rectify it within the timeframe of the project. Should there be a need for them to come back to finish a handful of deficiencies after we turn things over, these proactive efforts ensure they are able to do so with minimal impact.

No Deficiency List = More Problems Later On

The deficiency list is also there to protect us collectively. Without it, we have no way of establishing a benchmark as to
what was a deficiency and what is, in fact, damaged by the owner.

An important thing to remember when applying this list with the monies owed upon final completion is the allocation of funds. A dollar amount should be allocated to each individual deficiency so that the owner is able to retain the specific total associated with those listed deficiencies from the contractor’s final draw. Likewise, is having the said deficiency list signed off by the owner. This provides clarity that the items listed along with their associated costs to repair or replace are true and accurate. Remember, transparency and accountability, it’s good practice and good business.

**Project Close-Out**

Concurrently, we coordinate all final inspections. We submit all letters of compliance, inspection certificates, and all other related documentation as requested by the consultants and the authorities having jurisdiction.
We then obtain occupancy. We proceed by collecting all deposits and letters of credit the client would have submitted at the beginning of the project. We provide final project financial updates, submit for and obtain final payment, as well as hold back monies from the client. In doing so, our presence is felt and seen until the very end and beyond.

If required, we provide a roster of technicians and personnel to be present for your grand opening to take care of any issues that can be looked after immediately.

**Post Turnover Return**

If, and only if required, we will return to the site (which by now has become your turned-over premises) respecting a previously mutually agreed upon and documented schedule of access and execution. That agreement will have been discussed at the very beginning of our time together. In fact, it’s part of our Customized Communication and Execution Plan (CCEP). Speaking of which, let’s not forget that although both parties’ interests must be taken into consideration,
the quicker we can “get out of your hair”, the better. Therefore, it’s in everyone’s best interest that accommodating access be provided as freely as possible so that final works be completed expeditiously. Suffice it to say, our commitment – both to you as well as ourselves is to always strive to complete all our work by the official turnover date. It just makes things simpler.

**Warranty**

Warranty is a subject that I feel needs to not only be discussed but also clarified. It’s a topic of contention amongst owners and contractors – especially when the warranty is needed to be exercised.

Right out of the gate, I will tell you that if you do not do your part in upholding your obligations as it relates to the warranty, then it’s about as good as the paper it’s written on.

Let me give you an example. Roofing warranty: the example here is that you [the owner] must show proof of documented periodic inspection in order to appease one of the many stipulations the roofing manufacturer will have put in place in
order to avoid paying out if a problem should arise.

   In a quick brushstroke, owners need to be looking at preventative maintenance, inspections (frequency varies), protection, and general upkeep. Those who don’t adopt these measures erode the validity of the warranty and further minimize any leverage they may have to get things repaired and/or replaced under warranty.

   Therefore, it’s not just about producing project close-out documents or warranty documents; it’s also about sitting down with your client and educating them as to what their responsibilities will be moving forward. That’s how a successful project is wound down and turned over.

   No different than how we started it. We sat around a table getting to know each other; now we’re sitting around a table getting to know and reviewing the mechanics and all the parts of your new premises we’ve just completed – together. Imagine the increased confidence that alone would give you as you put your new facilities to work?
Post-Project Review

I can’t stress enough the importance of assembling the key stakeholders after final project completion and performing a Post-Project Review (aka Project Post Mortem). This must be done as soon as possible, upon final completion, as the information is still fresh in everyone’s mind.

Establish a setting that reinforces a safe, welcomed, and respectful discourse. Encourage every key stakeholder to participate in providing each of their experiences throughout the project. Good or bad. They must all be shared and documented in order to improve each and everyone’s performance moving forward.

As the contractor, this is an optimum opportunity for you to be able to collect this information and use it to improve your company’s overall performance on your next project. Either by leveraging it to make the necessary changes/tweaks to improve execution and delivery; or to guide future key stakeholders based on this historical data.

Best of all, this enables your client one last opportunity to share their experience
working with you and the remainder of the construction team. Once again, allowing them the opportunity to be heard. Your firm making the noted changes and improvements will be your opportunity to prove you not only heard them but also understood them.

**Aftercare Program**

Once the project is completed, we are never more than a phone call away. It’s how we like to maintain our relationship. It’s part of our aftercare program.

Speaking of which, that’s another area in which I feel contractors fail to invest any or enough time and/or effort. It’s one of the best and most rewarding low-hanging fruits available to contractors, yet most fail to appreciate or recognize it for what it truly is – showing care for your client once it’s all over. And it’s simpler than you might think.

Reach out, be present, stop by if you’re in the neighborhood, send them a gratitude gift of sorts; either the anniversary of their business or the anniversary of the project completed together. One of the simplest
acts of appreciation that pack the biggest punch is a handwritten note mailed the old fashion way – snail mail.

Each of the aforementioned means of expressing gratitude and appreciation are ways that your client is reminded just how important they are to you and your firm. Remember, the whole reason you took on this different approach is that you wanted to distance yourself from the transactional way construction has always been done to a transformational method instead.

Stay in your client’s peripheral vision. That’s how you continue to make them feel appreciated, valued, and cared for. Your client will be over the moon and, without a doubt, will never forget who to call when their next project roles around or who to refer when someone from their network asks them for advice and/or a referral.

References, Referrals, and Testimonials

As a contractor, if you’ve done your job right and followed the steps I have shared thus far, you can rest assured that you have a solid grip on repeat business from your client. However, referrals are where you
The Collaborative Construction Process™ can increase your business. That said, there is a strong likelihood that your client’s friends and close contacts share the same ideology and core values which means that they are a step or two closer to being a right fit, like-minded client for you.

There is also a reference; you can never have enough of those. Letter types are easy, but asking your clients for a video testimonial is where it’s at. You can repurpose them on your firm’s website or social media. I would caution you that you must acquire their written consent prior to making use of the videos. It is very worthy and respectful that you have a conversation with them on this very topic. Do so at the same time you ask them for this reference.

**Reciprocation**

There’s one last thing I would strongly recommend you do as a contractor. Assuming you’ve followed our Collaborative Construction Process™ coupled with maintaining the dedicated commitments and efforts required to achieve the success both you and your client desire, there is something else you
can do to ensure what goes around comes around.

Reciprocate. It’s so simple, yet many underestimate or undervalue the importance of being their client. Acknowledging them publicly, and ensure you and your firm do what you can to support their business.

A common misconception is that people think that just because their client’s product or service is not what they use, they aren’t able to support them. That’s all but a limiting belief. One can and must continue to support them through social media platforms, referrals, and recommendations.

It’s good karma, and there’s never been a negative outcome from it. Appreciation and gratefulness will multiply. Try it!
Chapter Twelve

Here’s How We Can Help You

“Help others achieve their dreams, and you will achieve yours.”
—Les Brown

We look for like-minded, right-fit clients, and we hope you want the same. We hope that, by transparently giving you this front-end added value, we have set the stage for what will become your unique experience working with us. Ultimately, we achieve a successful project through honesty, trust, communication, and collaboration. Those are paramount characteristics that build
partnerships which we then nurture into long-term relationships.

Being upfront with you and giving you the straight facts is what we are all about. This is how we achieve great success together. Under-promise and over-deliver - it’s the way to go.
Build Relationships on Your Next Construction Project

The last thing you need is another heated phone call or disappointment. Yet, here you are again, spending precious time in your already busy day tracking down your contractor only to have your questions and concerns met with more defensiveness and excuses.

Imagine what it would be like to feel understood. To go to bed at night knowing that one of the biggest financial investments you’ve ever made in your
business is in the hands of someone you know you can trust.

Gianluca Pascale, founder and CEO of Centercon Inc™ shares the secrets he’s discovered through 35 plus years working in the trenches of the construction industry. The dismal patterns and status quo of client and contractor relations. Instead of getting discouraged, he got determined. His focus and passion for relationships are at the heart of Centercon Inc™, which has given rise to the Collaborative Construction Process™ he shares with you here.

Gianluca gives you proven steps to prepare differently for your next construction project and set yourself up for a contractor experience like you’ve never had before…a great one.

If you have found this book of value and would like to learn more, here’s what you do next:

**Step 1:** Download your Collaborative Construction Extractor Scorecard at: construction-optimizer.com/scorecard

**Step 2:** Watch a short video at: construction-optimizer.com/intro
The Collaborative Construction Process™

**Step 3:** Book a 30-minute call at: construction-optimizer.com/request-your-call

The time for change is now. Let us help you learn how to best prepare yourself by first building relationships that last on your next construction project.
Build Relationships on Your Next Construction Project

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