

RESTORATION PROJECT PLANNING

5 minute read

You just got the call, and everyone is excited. No matter how many times it happens, every time the phone rings and it's a client needing help with their broken pipe or sewage backup, that energy and adrenaline washes over the whole office. Yes! Sounds like a good one. Could be really big. Let's get out there.



There is no mistake: that feeling is a genuine high. The question is, how long before it comes crashing down to reality, and what will be the reason? For every restoration company, the length of the high is determined, most times, by their ability to “plan the work, and work the plan.” Proper restoration [project planning](#) has to start far earlier than that call. It must anticipate all the main issues and hurdles and must establish clear and simple tasks and performance guidelines. If this is done before the call, there's a chance that the high will last far past the mobilization of the crew.

It makes sense that the first person on the scene is going to have the greatest impact on the plan. That initial visit to the loss site, first readings and observations of the damage, and conversation with the client are going to set the table for everything that comes after. There should be a few important tasks for this person to achieve to set the groundwork for a successful project plan. We refer to them as “The Three ‘S’”:

SIGN

SKETCH

SCOPE

The importance of these three tasks cannot be overstated. Think about the potential pitfalls that can come from this simple encounter:

SIGN- if your first responder does not get all the proper paperwork executed at the start of the project, your risk goes through the roof. There will be major liability issues to deal with, and at the end of the day it may be difficult - if not impossible - to get paid for your services. After all, your work authorization or contract may not be valid!

SKETCH- part of your responsibility to the client - and their carrier - is to support your invoice. Creating a sketch of the affected areas defines your tasks and gives everyone a visible outline of your work. For your teams, it gives them clear and unambiguous direction when they are going over the work to be accomplished.

SCOPE- we assume that the [first responder](#) is one of the more highly trained and skilled individuals in your company, and as such is going to be able to assess the damage and establish a proper restoration project plan. This is so important to your overall performance and ultimate success, and a failure to accurately assess the damage and what it will take to fix it will muddy the waters every step of the way.

How can I guarantee that my restoration project planning is being done correctly?



That's an answer that can only be found in your initial response protocols and systems. How is your response set up? Is it "next man up" who shows up, or is it directed to a certain person with specific skills to be the first responder? Do you have a pre-set "start package" of paperwork that **MUST** be filled out at the start, or do you fill them out as needed? Finally, do your crews approach the project with a "spike the job" mentality, bringing

equipment in their arms off the truck at the start, or do you take time to assess, measure and plan your work? Answer those questions first and you will quickly see just how your company is set up to succeed - or fail.

The dichotomy between speed ("emergency services") and prudence ("restoration project planning") trips up even the most seasoned business owner at times. That energy we talked about earlier can turn us away from good business practices, especially if the project looks like a big one or if we get a sense that the client may be looking to go in another direction. [Any desire to get the job at all cost may](#), in fact, become very costly in the end.

Ben Franklin was not a restoration professional, but his words ring so true in our everyday work. If you do nothing else in your daily tasks, you should remember these poignant words:

"If you fail to plan, you are planning to fail."



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