

COCONSTRUCT™

coordinate+communicate+control

10 WAYS

TO STOP AT LEAST

**50% OF
MISTAKES**

**& SAVE HOURS IN YOUR
SELECTION PROCESS**

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A QUICK THOUGHT ABOUT THE SELECTIONS PROCESS

Have you ever been so overcome with frustration because of your selections process that you just leaned against the closed door of your office and silently screamed?

If you build custom projects, there's no escape... but, **there is hope.**

Late decisions. "That's not what I ordered." Sticker shock. Peeved clients. Wasted time. Expensive rework.

Of all the challenges faced by custom builders and remodelers, one always tops the list — effectively controlling the selections process, plus the related change orders and communication.

However, with 10 simple steps, you can not only reduce the frustration

in the selection process, but you can actually turn it into a tool to help you sell more projects.

As with anything in life worth pursuing, it takes some effort on your part, but by being smart in your approach, that effort will go a long way.

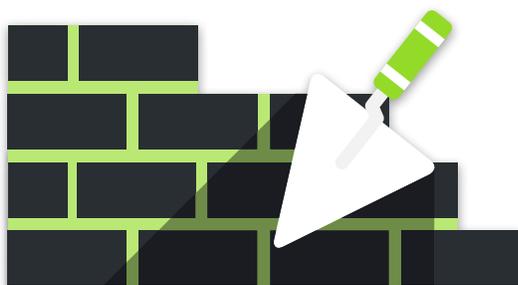
Keep reading to find out how.

Donny
Founder & CEO

START

LAYING THE GROUNDWORK

These first four steps can take you from nothing to something, and provide a solid foundation for the later steps. Even if you already have a documented selections process (or you think you do), these recommendations are a good way to see if you are on the right track.



#1

WRITE IT DOWN

You did not expect to formulate a new, better selections process and keep it all in your head, did you? You likely have some level of organization for things in your mind already, so you need to write that down or update your existing documents to fill in the holes.

At this point, don't worry about creating a beautifully formatted document. Whether you do it on paper or electronically (although electronically will make the next steps easier), you simply want a list of decisions that your clients need to make. Not all decisions will apply to all types of projects, and that's fine for now. These choices will be our building blocks later.



IDEA SUGGESTION

Keep a pad of paper handy with you throughout the day today. As you come across selection items (or problems), write them down. You'll be surprised at how many items are missing from your selection sheet or have details that you never quite remember to ask about.

#2

DECIDE YOUR LEVEL OF DETAIL

Custom projects overflow with details. Attention to detail is what many custom building clients demand, which means you better keep it straight.

And what happens when you don't? You eat the cost of your mistakes. Most builders we talk with figure they lose at least a few hundred dollars on each project just from this challenge.

And what happens when your clients get the details mixed up on their end?

YOU STILL EAT THE COST OF THE MISTAKES.

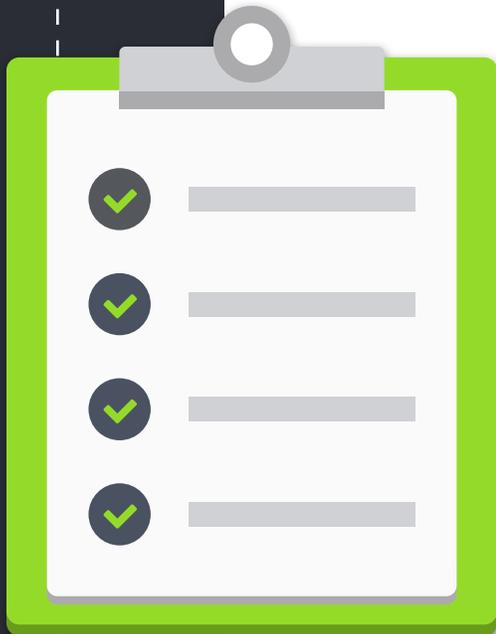
Successful custom builders and remodelers always have a way to manage those details effectively. Those who do not, have angry clients and sad margins.

Angry clients generally take to Social Media and don't have many nice things to say.

So, if you were to take two different contractors who build the same type of projects and compare their lists from step #1, what would you find? Well, I've seen kitchen remodelers with 150 items on their selection sheets while some custom builders, who craft some gargantuan multi-million dollar homes, only have 45.

WHO DID THE BETTER JOB?

Not to sound like a "let's all hold hands and be happy" kind of answer, but they both might have done equally good jobs. These contractors simply picked varying levels of detail.



For example, Builder #1 may have had an item for "Plumbing Fixtures," whereas Builder #2 had items for "Master Bath Faucet Manufacturer," "Master Bath Faucet Model," "Master Bath Faucet Finish," "Master Bath Toilet," etc.

Which one is better is purely a function of your personal preference and how your projects flow.

If your clients typically visit one plumbing fixture vendor, who sends over a nicely itemized list, why bother entering everything separately? However, if your clients go all over the place for fixtures, maybe you do need a very detailed spot to keep everything straight.

The old phrase "Keep It Simple, Stupid" applies here. The shorter your selection sheet can be, while still

covering all of the bases, the better. If the list is too long, you can easily overwhelm your clients and spend too much of your time updating it.

Of course, if it is too short, you might as well have not bothered.

► THE POINT

You need to be comfortable that your chosen level of detail gives you the information you need and that you have a good way to track it. With this done, you will be organized and your clients will know where things stand.

Without that, the downward death spiral begins.

#3

CATEGORIZE YOUR ITEMS

At this point, we need to break down your selection items into bite-sized chunks that are easy for your clients to understand and that are simple for you to find. The selection items you created in prior steps will then fall within these categories.

Remember that we are trying to create a selection sheet that is helpful to both **you AND your clients**. If you only have a long laundry list of jumbled decisions, your clients will freak out.

Helpful will be the **last** word that comes to your client's mind.

However, if you do a good job of creating categories and presenting them clearly to your client, you will cut down the problems associated with forgotten decisions and with buyers getting ahead of themselves. It won't solve every last squabble, but a few headaches saved is better than none saved at all.

There are many ways you might categorize your selection items:

CHRONOLOGICAL ORDER OF DECISIONS

- › 01 - Retaining Walls
- › 02 - Windows
- › 03 - Exterior Doors
- › 04 - Overhead Garage Doors

OFFICIAL STANDARDS (SUCH AS CONSTRUCTION SPECIFICATIONS INSTITUTE MASTERFORMAT™)

- › Division 03 - Concrete
- › Division 04 - Masonry
- › Division 05 - Metals

BUDGET & ESTIMATE CODES

- › 2000 - Framing
- › 3000 - Mechanical/Rough
- › 4000 - Exterior Finish
- › 5000 - Doors/Windows

ROOM CATEGORIES

- › Living Room
- › Dining Room
- › Kitchen

Even when you have tons of selection items, categories make it all manageable. It also can help you and your clients gauge timelines, reconcile budgets, and communicate with outside parties (such as an architect).

#4

CREATE A TEMPLATE

CONGRATULATIONS!

Look at what you have — an organized, manageable, coherent list of decisions that can be made on a project. This alone can be a big time saver — only if you actually put it to use on your projects. This is why we need to turn this into a template.

Take a few minutes to format your categories and selection items into an electronic document. Leave room for some extra lines or columns for each selection item (we will touch on this further in the later steps).

We have more changes that we are going to make, but even at this point, **you are ready to start using this selection sheet on your very next project.**

It's going to get even better, but this is still a perfectly respectable starting point.

When you start a new project, simply make a copy of your selection template. Depending on the size and complexity of that project, you could wind up deleting half of the items if they do not apply. In other cases, you may find that you are missing a few things. Go ahead and add them in.

In fact, if you think that those items may pop up on future projects, copy and paste them back into your saved template so they are there for future use.

Your selection sheet is always a work in progress. When you first start, you will want to update your template with items that you overlooked at previous steps. As time moves on, even the best selection sheets will evolve as items change (e.g.. green building components, new “must have” home automation gadgets, etc.). No problem. You simply pop them onto your template. When the next project comes along, you'll be ready for it.

REVIEW

SPELL OUT THE BASICS

Even if you stopped at step #4, you will have taken some big steps in the right direction. But, in all honesty, you will have only created a mediocre process for selections.

That may sound harsh, but in reality, most things (builders included) are just average. After all, that's the definition of average. And, depending on the current state of your selections process, "average" may be a big leap in the right direction.



Having a coherent list of decisions on a project likely puts you somewhere in the middle of the pack. Not awful. Not exceptional. Simply surviving.

The problem is that probably 80% of your competitors are also in the middle of the pack. It's like a bell curve with a big clump right in the center.

And by their very nature, clients who want a custom project likely want someone who looks special compared to everyone else. However, if clients have to choose between a bunch of contractors that all look the same, they're going to pick whoever offers the lowest price.

Can you blame them for picking someone cheaper than you? There's nothing that helps you stand out.

WE WOULD HUMBLLY LIKE TO ASK YOU TO LOOK BEYOND THAT — TO SEE WHAT COMES FROM EXCEEDING "AVERAGE."

To move in that direction, in steps #5, 6, and 7, we are going to upgrade your template so that you can preemptively stop the information gap that leads to frustrated clients, late decisions, and a lot of wasted time.

SET MILESTONE DECISION TIMELINES

Bad weather or indecisive clients — it's probably a tie as to which causes more delays on projects.

And while clients do not understand how delays cost money, you definitely do. That is why it is up to you to stop them before they start.

Every selection item has to be decided on at some point in the project timeline. So, let's go back to your template and write it down.

#5

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#6

“But dates are different on every project!”, you say.

That’s exactly right, which is why instead of dates, you are going to use milestones from your project schedule.

The relationship between selection deadlines and schedule milestones almost never change. So, you set them once on your template, and from day one, your clients know when decisions need to be made.

It also saves you from constantly updating deadline dates on your selection sheet. For example, if the window decision is due by the end of excavation, but excavation was delayed by rain for two weeks, the windows are still due by the end of excavation.

The milestone method of selection deadlines sets your client’s expectations to keep them on track, and it automatically adapts to your project’s schedule with zero additional work for you.

Easy enough.



PROVIDE EXPLANATIONS

You eat and breathe this stuff every day — and not only the pretty stuff that clients like, such as crown molding and flagstone. We’re talking about SEER ratings and R-values. Those are things that affect the quality of the project and may be items on which you pride yourself.

But, if you never explain them to your clients and help them understand why they should care, they never will.

To fix that, find a spot on your selection sheet template where you can write in a short and sweet explanation of some of the choices, especially when it comes to the “hard core” construction items (i.e. HVAC, water heaters, insulation, etc.) that clients typically do not understand.

By educating your clients, they will make better quality decisions. In turn, they will feel better about their home — and you as their builder. Best of all, you only have to enter that information once on your template, and it keeps working for you from there.

Because at CoConstruct we work exclusively with people who build custom projects — custom builders, remodelers, and design/build firms — this step becomes vital.

#7

WHY?

Well, when anything can go into a project, and your clients likely know nothing about 80% of those choices, it's easy to see how well-intentioned, yet misguided decisions later irritate those customers.

THEN THEY POINT THE FINGER AT YOU.

But, if you use your selections process to educate them, they will have a better building experience and a better outcome — resulting in referrals later on.

EXPLAIN THE PARTS

MY WIFE LOVES SURPRISES.

However, when we built our first home (as clients), it became abundantly clear how she was **NOT** cool with surprises when we walked into a vendor showroom to make our selection choices.

We found out that simple decisions are not always so simple.

If you throw one frustrating surprise at your clients after another, it will come back to bite you.

Now that you have eliminated many surprises with the prior steps we have already discussed, we need to deal with “compound decisions.”

WHAT DOES THAT MEAN?

Well, clients think they are simply picking our hardwood floors. Easy, right? But, what about the species? The width? The stain?

You only need the countertop decision? How about the material? The color? The edge detail?

When there are three questions for each item that clients thought they already had answers to, things can get tense quickly.

The cabinets and countertops were the “gotcha” for my wife and me on our home. And, we were living 2.5 hours away at the time. We were less than pleased when we realized we had to waste another sunny Saturday to come finish the decisions we thought we could handle in one visit.

Fortunately, the solution is easy. On your selection sheet template, you can have a single item with a short note explaining the subparts of the choice.

It's still one selection choice, but you have taken the surprise out of the question.

Once again, a little help on the template keeps your client from getting overwhelmed and makes sure that you receive all of the information that you need, on time.

TURN A CHORE INTO AN ASSET

Think back to that bell curve. Once you complete steps #5,6, and 7, you are making your way closer to that right side.

You're moving from "stuck in the middle" to someone who stands out in the minds of your prospects.



WHY?

Well, while most custom building clients get smacked with surprises, are asked to make decisions in "builder-speak" that they don't understand, and are constantly being told they are late on decisions, it's no wonder people tense up just thinking about building.

But, there is something different about your former clients.

They seem more relaxed. They had a lot to pick out, but they weren't in a rush. They seemed to know what to expect and what they were talking about.

When they talked with their friends, there's a calmness and confidence to how they describe working with you.

That comes from you filling in the potholes in your selections process. Although driving on a road with no potholes may be nice, it's not exceptional.

Remember the episode of *Seinfeld* where Kramer decides to use black paint to get rid of the dotted lines separating two lanes of traffic (which were both going in the same direction). Elaine commented on how luxurious it was to have such a nice, wide road.

NOW THAT'S A ROAD THAT STICKS OUT IN PEOPLE'S MINDS.

For our last three steps, we are going to go beyond solving problems to creating a selections process that can set you apart as an exceptional builder or remodeler.

GIVE A STARTING POINT

How many decisions did you have to make the last time you walked into a coffee shop for a cup of joe?

What size? What blend? Regular or decaf? (Duh, regular.) Room for cream? For here or to go? Cash or credit?

If that's what it takes to order coffee, no wonder clients' heads spin on a custom building project. But do you know what is a million times worse than having 10 different choices?

HAVING LIMITLESS CHOICES

A builder who prides himself on telling clients that anything is possible, but does not give their clients anywhere to start, is doing him and his clients a disservice. That can be paralyzing for clients.

Then come the changing choices, late decisions, and buyer's remorse.

Instead, draw a line in the sand and let your clients branch out from there. Simply note your starting point for a selection, and related thoughts, on the selection sheet template.

You are the person with the experience, so no matter how custom a project may be, laying out a possible choice for a selection decision, and then explaining the pros and cons of an item, allows your client to gain from your expertise. From there, they can chart a logical (and timely) course for other options they want to explore.

They may have all the options in the world available to them, but with a good starting point from you, they won't take all the time in the world to decide.



#9

PROVIDE RESOURCES

Not only can you give your clients a starting point, but you can (helpfully) push them in a certain direction when it comes to certain manufacturers or vendors that you want them to use.

You may allow your clients to go anywhere or buy anything, but by adding a few website links and contact names in your selection template, you have a greater chance of them using the vendors and brands that can make your life easier.

Your clients are researching stuff online. While the web has lots of information, it is not always right. If there is misinformation out there — and if there is — your clients will no doubt manage to stumble onto it.

PLUS, A HALF-EDUCATED CLIENT FROM A HALF-CORRECT WEBSITE IS, WELL, LESS THAN IDEAL.

So, as you come across resources online, be it from vendors, trade organizations, or association websites, copy the link onto the appropriate selection item on your selection template.

By gently pushing your clients in the direction of proper information, vendors you trust, and products you prefer, you can empower them to make better decisions that will remove hassle from your life.

USE YOUR PROCESS AS A SALES TOOL

The strong excitement of making a home one's own, poised against the sheer magnitude of all the decisions they have to make, can keep a potential buyer from signing a contract.

Or worse, it forces them into a production builder's showroom.

But, with the prior nine steps complete, is that going to happen to you?

YES! It's because the prospect will still be scared.

That's because even though you have an organized process, in bite-sized pieces, with clear steps, without jargon, with parts explained, and accompanied

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by suggestions and resources to get the client started, you still have not told them about it.

ALL custom builders and remodelers tout that they have great customer service. So, if all you do is talk about how it's smooth sailing for clients who build with you, guess what you just did?

You made yourself sound like the other 80% who are stuck back in the middle of the bell curve. Talk is cheap, and you will sound like everyone else.

But, by discussing and then actually showing prospective clients your selections process, you actually have the evidence to put their minds at ease.

Honestly, unless you are selling to an accountant, few people are going to get giddy over seeing your spreadsheet for tracking selections, so you need to find a way to present it in terms where your prospective clients understand the "what's in it for me" factor.

However, once you can do that, it is your silver bullet. It is your hands-down proof that you are doing something different — something exceptional — that solidifies your position at the top of the heap.

AND WE WISH YOU BEST IN YOUR EFFORTS TO STAND OUT FROM THE REST.

ABOUT COCONSTRUCT

CoConstruct is the #1 highest rated custom builder & remodeler software in its vertical. CoConstruct helps to eliminate the chaos in a builder's day while striving to create rewarding building experiences for the builder and their clients. With CoConstruct custom builders and remodelers are able to win more projects and build more efficiently. This is done through online lead management, selections, scheduling, client communication, single-entry financials, estimating, proposals, budgeting, file/photo sharing, change orders, warranty, and more. With simple, monthly pricing that's based on your active job sites, and an industry-only 90 day money back guarantee, CoConstruct brings these benefits to custom contractors of all sizes.

For more information, please visit [CoConstruct.com](https://www.coconstruct.com) or call (800) 213-3392.