

# Get Organized!

Documentation is important in any business—but even more so in the complex world of custom integration.

by **Helen M. Heneveld**



**Custom electronics dealers are small businesses owners.** People in business understand the importance of organization in the office, in the store, and of the paperwork. You can multiply that importance tenfold, however, when you're talking about running a custom installation department. Organization becomes even more important given the many details of a project.

Dealers should organize the flow in the office, have mailboxes for every employee, and have a designated place for job accounting folders and job field folders and everything else of importance. Of course, everyone must know these places and use them.

On the computer network, dealers should establish a directory structure for projects and share it with everyone, making sure all relevant employees use it and nobody uses it to store personal files. A suggested directory structure could be: **\current projects \client name \subsystem** and once the project is completed, they can be moved to **\past projects**.

It's a good idea to store past projects for about a year. In the warehouse, companies should have specific places for paperwork, such as the field folders for the current projects, work orders, shipping, receiving, and return material authorization (RMA) documentation.

Inventory should be stored safely with controlled access, and should be organized, stocked and labeled. Materials for a project should be staged with a "bill of materials" checklist on shelves or wheeled

shelving that makes it easy for loading into the truck.

Some dealers have an area to "burn in" the equipment and run tests. To ensure productivity of the installer, the trucks must be well stocked with equipment, tools and spare parts. This includes simple items, such as wall plates in all possible colors to minimize trips to pick up the correct supplies. Tools should be in good working condition and readily accessible to the installer in the truck, in a tool bucket and on his tool belt. Every installer should have a "Good Things to Know" notebook, containing information that helps them do their job—TIA-568A wiring schematic, wire types usage chart, instructions for installing key devices and equipment. In fact, every person in the company should have a "Good Things to Know" notebook.



## Inside the Project Folder

Project information resides in two places:

**Project Accounting Folder** holds all the paperwork that remains in the office and is kept in the office at all times:

- Project contact information
- Original signed proposal and acceptance agreement
- Originals of all signed change orders
- Invoices and any paperwork related to accounting
- Certificates of insurance
- Originals of permit applications and permits
- Client sign-offs

**Project Field Folder** contains all the information related to the installation of the project and is used in the field. It is wise to use a binder or "Classification Folder" with dividers and fasteners to keep the information categorized and organized:

- Project contact information
- Copy of the proposal—without any dollar amounts
- Copy of all change orders—without any dollar amounts
- Originals of permit applications and permits
- Wire chart
- System drawings of layout and hook-up
- Product details for installation
- Work orders
- Installation checklists
- Communications
- Any other information pertinent to installation

## Rules of Documentation

Paperwork on custom installation projects can be prolific. There is so much information that having it well organized is essential. Documentation is vital for clear communication within a company, with the homeowner, with the builder and with other subcontractors. Having key information all in one spot starts with a simple "project information" form that provides all the contact information for all the parties involved in the project on one page. Good project documentation can increase profit, so dealers should set up forms and faithfully use them.

It is much better to solve problems on paper and not in the field. There are five basic rules of documentation that dealers can follow:

1. **Date everything.**
2. **Divide and conquer** by having dividers in the "project folder."
3. **Organize, label and file** all paperwork immediately.
4. **Place copies in order**, with the most recent on top, and put a slash through the old versions.
5. **Make sure all writing** is legible.

## Communication Is Key

With custom installation projects, the clients can have new ideas and request changes along the way. It's a must to document changes at the time requested and to be sure to get approval, sign-off and partial payment. Change orders should outline additions, deletions, additional labor requirements and pricing.

Dealers should document the changes and incorporate them into the system diagrams. Then they should communicate the changes to all parties involved. The client must understand what he is

getting and the total costs. The installation department needs to know the current design of the planned project. Purchasing needs to know exactly what is needed for the job.

It's a dealer's job to provide homeowners with the technology for their homes—a tall task that gets even taller when companies aren't organized. **CE Pro**

## Still Need Documentation Help?

The author of this story, Helen Heneveld, wants to help dealers get started. If you want all the necessary documentation information on one page, drop her an email ([helen@bedrocklearning.com](mailto:helen@bedrocklearning.com)) with your contact information and she will email you a "project information" spreadsheet template.

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