

# Documenting for Success

Tuesday, September 17, 2019  
8:00-8:50 AM

CONVENTION EDUCATION



Jeremy Rowley  
*J. Ranck Electric*

**This session is eligible for 1 Continuing Education Hour.**

For these hours to appear on your certificate, you must:

- Have your badge scanned at the door
- Attend 90% of this presentation
- Fill out the online evaluation for this session:



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Good Morning!

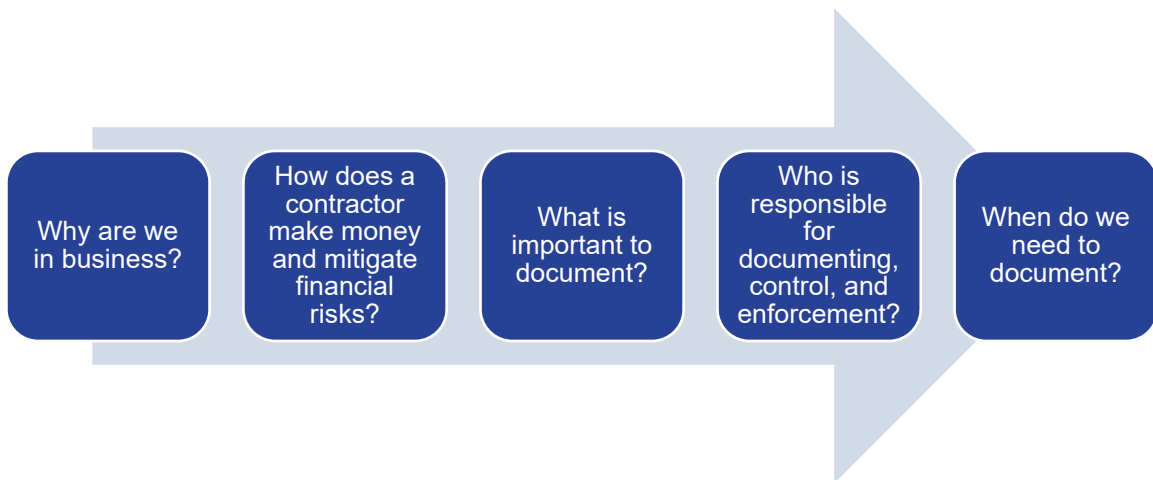
Welcome to Vegas

Why am I here?

Why are you here?

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Why, How, What, Who, When?



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## Why?

To make a profit  
(ROI / improve on  
estimate)

To continue  
building a  
company's  
reputation

To grow a  
client/customer list  
(repeat customers  
preferred)

To provide for  
employees and  
families of  
employees

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## How?

Be extremely clear  
and transparent  
about  
expectations on  
both sides of the  
contract

What's fair is fair.  
Both parties must  
hold up their end  
of the deal

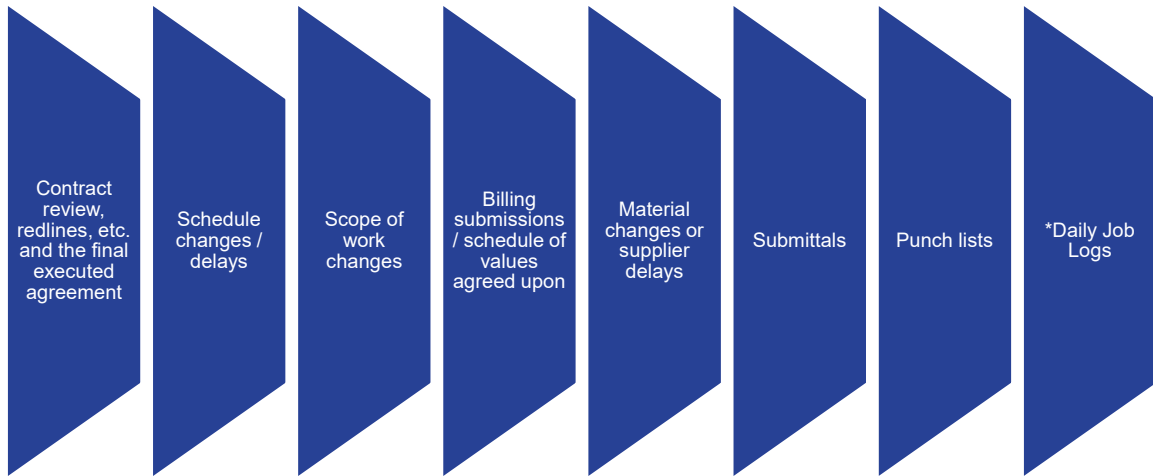
Written email with  
a request of  
acknowledgement

Conversation face  
to face or by  
phone before or  
after email?

Organization of  
documentation  
and  
acknowledgments

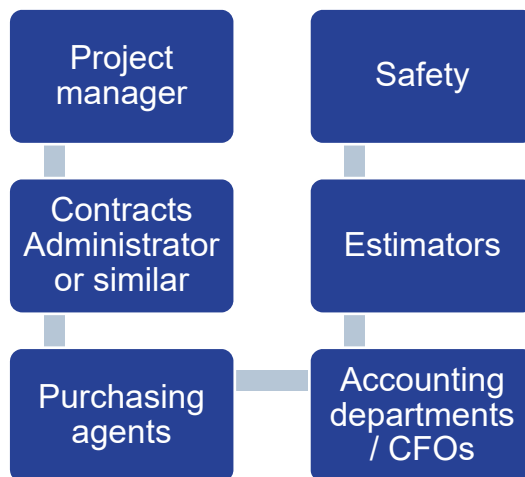
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## What?




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## Who?



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When?



Every time,  
constantly, and  
consistently

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Self Check Question?

Who will benefit from proper documentation and how?

Consider the impacts with and without documentation

Ask this per issue or change

Benefits for others can be a good thing

Benefits for yourself is always a good thing

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## Forms and Format

- Contract forms
- Bid Proposals
- Change Order Requests
- Extension of Time
- LOIs, NTPs, and LNTPs
- Pencil Copy Billings
- Daily Job Logs
- Job Safety Analysis
- Schedules
- Purchase Orders with Terms
- Notice to Cure
- Notice of Default

## Quality

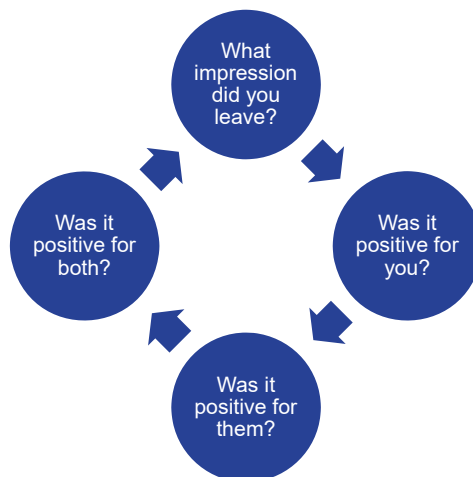
- Quality is for more than install and inspection processes
- Quality of you forms and communication
- Quality of your internal process
- Quality of your organization of documentation
- Quality of documentation enforcement

## Reap The Rewards



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## Business Reputation



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## Repeat Customers Are Fans

We'll be back

You can count  
on us

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## Complete the Online Evaluation

Up Next...

- **9:00 am – 1:00 pm** – *NECA Show Hours*
- **1:15 pm – 2:30 pm** – *Closing General Session with Nichole Malachowski* in Mandalay Bay Ballroom EFGH
- **7:15 pm** – *Closing Celebration – Michael Jackson ONE* at the Mandalay Bay



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